

SS Historical Paper  
No. OP-1 (Vol. II)

# SUPPORT SERVICES HISTORY

*Return to:*

(TITLE OF PAPER)
<u>History of the Retirement</u>
<u>Counseling and Placement Staff</u>
<u>(Attachments)</u>
(PERIOD)
<u>19 June 1967 - 14 March 1969</u>

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Attachments Relating to

HISTORY

OF THE

RETIREMENT COUNSELING AND PLACEMENT STAFF

VOLUME II

25X1A

Compiled by [REDACTED]

May 1969

S-E-C-R-E-T

GROUP 1  
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Attachments Relating to

THE HISTORY OF THE RETIREMENT COUNSELING AND PLACEMENT STAFF

VOLUME II

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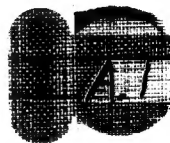
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July 1967

SCHEDULE FOR THE CREATION, DEVELOPMENT  
AND TESTING OF THE  
RETIREMENT COUNSELING PROGRAM

June 1967 to June 1969

July, August & September 1967 - The Concept Period

1. Discussions with senior Agency officials to determine scope of assigned task.
2. Read, research and contact outside organizations to develop breadth and depth for foundation and direction.
3. Lay an initial plan and test its validity.
4. Discuss projected program thoroughly with each Deputy Director for reaction and insight into career service policies and variations in intentions, procedures and personnel handling.
5. (No staff was available for the Program at the outset. On 24 June, [REDACTED] informed a priority task would be to round up a team of supporting officers and secretarial assistance.)
6. During these three months, meet with Deputy Director and request two senior offices with broad backgrounds in the directorate to work on the Program for one to two years.
7. Have all members of the team designated by late September. (The last two officers reported in on the 18th and 20th of October.)
8. Acquire office space. (A temporary office in Ames Building and space in the Magazine Building were allocated and the office in Ames was occupied in September.)

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October, November & December 1967 - The Fact Finding & Research Period

1. Locate and assemble background information, from both inside and outside the Agency; collect pertinent statistical reports; extract and cross reference important details.
2. Interview all Agency retirees - October through December 1967 - for insight into problems and approaches toward their solutions, and for testing the inclusiveness and emphasis of the original plans.
3. Establish the areas of concentration in order to make a frontal assault on the entire Program.
4. Breakdown the areas of concentration into work sectors.
5. Assign responsibilities based upon observation or interest, motivation and initiative.
6. Prepare at least an initial organization of files based upon areas of activity and responsibilities, to permit efficient control, distribution and later use by the entire staff.

7. Develop bibliography and launch a program to acquire two locations for Retirement Reading Rooms; from the bibliography commence the acquisition of an essential basic collection (2 copies) for the reading rooms.
8. Arrange an orderly means for keeping D/Pers, DDS, DDI, DDP and DDS&T informed through briefings and periodic status reports.
9. Meet with the chief of each career service to discuss his unique requirements and explain the possible assistance available in the RCPS.
10. Brief every career service board and the planned relationships between it and the Retirement Counseling Program.

January, February & March 1968 - The Period for Techniques and Tools

1. Begin the preparation of format and identify content categories of a Retirement Newsletter.
2. Plan a publicity campaign - bulletin boards, or cards at cafeterias, slips with checks, posters.
3. Relate the employee's dependents to the program.
4. Plan seminars; general Retirement Information plus special retirement seminars.
5. Draw up counseling procedures and methods, include support of other Agency components such as OTR, OS, CCS, OF, AND CRS.
6. Commence the systematic counseling of 73 retirees, and refine our earlier interviewing techniques.
7. Assemble kits of important retirement pamphlets and leaflets to be provided the retirees.
8. Prepare an unclassified Retirement Information Pamphlet for all employees for use in the office or at home.
9. Assemble necessary information and produce a guide to the various retirement assistance offices, with the matters for which each is responsible, especially guidance to personnel officers.
10. Prepare a special seminar for 1968 retirees to be given as early in 1969 as possible.
11. Develop close working arrangements with the Career Services for communicating with retirees, and exchanging retirement information and questionnaires.

April, May & June 1968 - Procedure and Workload Analysis Period

1. Acquire the retiree lists for the years 1968, 1969, 1970, 1971 and 1972 from the career services.
2. Compare these lists with machine runs; note variations and set up special procedures to aid the typical retirees.
3. Set up enabling procedures for using outside knowledgeable persons (preferably former Agency personnel) as consultants: Retiree Association, Re-employment Potentials, Individual Re-employment assistance, etc.

4. Prepare drafts of internal working procedures for the responsibilities of the RCP Staff.
5. Develop relationships between RCP Staff and other offices; include our support to them and their responsibilities in support of the RCPS and the Retirement Counseling Program.
6. Complete the identification of the statistics from the various RCP Staff activities; note those which need not be kept, those which should be kept informally or for a limited time as being of internal benefit to the RCP Staff, those which should be kept as permanent record, and those which have a greater value and should be forwarded monthly.

July, August & September 1968 - Staff Reorganization & Program Testing Period

1. Analyze Retirement Program in depth; the nature of the program; effectiveness of various parts of the effort; proper density and workload balance; nature and levels of working relationships with others; clarify responsibilities eliminating, transferring and coordinating as necessary.
2. Examine the magnitude of effort in each activity and determine the number of persons required to efficiently carry it out. The present austerity compels projection of the barest minimum number persons to carry out all functions.
3. Consolidate functions and activities where possible and related, for greatest efficiency and conservation of manpower.
4. Prepare job descriptions.
5. Submit proposed Staffing Pattern and assignment recommendations.
6. Expand "Alumni Association" concepts and prepare external facility to eventually serve as correspondence center, give placement assistance, set up group insurance program, establish an Agency supporting foundation, etc.

October, November & December 1968 - Adjustment and Regulatory Period

1. Refine procedures into OP or Agency regulations.
2. Conduct second retirement information seminar applying experience gained early in 1968.
3. Set up annual seminar series; prepare it for launching in 1969.
4. Prepare final set of questionnaires for use in annual approach to retirees while they are in the five year counseling zone, plus interpretations and instructions.
5. Complete the review of the Retirement Information Pamphlet. Make full use of suggestions from Career Services and from the retirees and their wives.
6. Review experience with publishing in Support Bulletins and the OTR Bulletins; prepare the patterns and procedures to be followed.
7. Complete staff studies and recommendations of legislation and regulatory changes to strengthen the Program.

January 1969 - Refinement and Rounding Out of the Program

1. Consultations with 1969 and 1974 retirees.
2. Hold one of the special seminars: preferably the financial planning seminar.

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Definitions of Descriptive Statements Covering Agency Employment

Summary of Agency Employment (SAE)

An unclassified statement prepared by the employee with the assistance of his component personnel officer which appropriately describes the history of his Agency employment. This statement will be prepared and submitted as soon as the individual can determine that he is on his final assignment with the Agency. It will be reviewed and approved as soon as possible by the appropriate offices, but no later than two weeks prior to separation from the Agency.

Synopsis (Limited SAE)

A limited statement approved by the appropriate offices covering the Agency experience of an employee who has had only limited responsibilities.

Personal History Summary

An unclassified document prepared by an employee with the assistance of the External Employment Assistance Branch. It includes the substance of the approved Summary of Agency Employment in addition to biographic information, prior work experience, travel, skills, training, language, etc. It will serve as a basis for subsequent preparation of job resumes and job applications and in instances when background information becomes pertinent; e.g., writing for publication, public speaking.

Resume

A brief extract basically extracted from the Personal History Summary and written either before or after retirement for the explicit purpose of portraying the appropriate aspects of an individual's experience against the requirements of a specific job in which he is interested, or for any other personal need.

Standard Form 171 (formerly Standard Form 57)

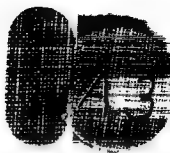
A non-classified Civil Service form used to apply for specific Federal positions.

Abstract

A four to six line abbreviated extract of highlights from the employee's summary to be used for job search purposes, in a numbered arrangement (omitting the name of the individual).



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- = Secondary responsibility  
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RETIREMENT COUNSELING PROGRAM  
(TASK FORCE AREAS OF CONCENTRATION)

ADMINISTRATION

Policy  
Organization & Management  
Coord. with Career Service  
Support

ACQUISITION OF INFORMATION

Interviews  
Existing Programs  
Fanfolds of Others  
Reference Collection  
Employment Offices  
Questionnaires

INDOCTRINATION

Bulletins/Notices  
Newsletter  
Commendations & Awards

INDIVIDUAL COUNSELING

Career Services Coord.  
Questionnaires  
Extent of Agency Counseling  
A & E Processing  
Letters & Resumes  
Background Summary & Index

SEMINARS

Group Needs & Org.  
Types of Participants  
Timing or Phasing  
Speaker Selection

TRAINING OR JOB PREPARATION

OTR Courses  
Off-Campus Courses  
Support for Retiree Trng.  
A & E Processing

RETIREE MARKETING

Employee Network  
Retiree Network (Agency)  
Employment Agencies & Orgs.  
Other Channels

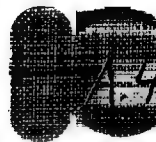
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THE  
CENTRAL INTELLIGENCE  
AGENCY  
RETIREMENT and DISABILITY  
SYSTEM



QUESTIONS and ANSWERS

OFFICE OF PERSONNEL  
WASHINGTON, D.C.

March 1969

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## THE CENTRAL INTELLIGENCE AGENCY RETIREMENT AND DISABILITY SYSTEM

### QUESTIONS AND ANSWERS

CENTRAL INTELLIGENCE AGENCY  
MARCH 1969

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## FOREWORD

The information in this pamphlet has been assembled by the Office of Personnel to answer questions most frequently asked about the CIA Retirement and Disability System and to acquaint employees with the benefits it provides for participants and their families. In the preparation of this information, the Civil Service Commission's Retirement Pamphlet No. 18, January, 1967 and the Foreign Service's "Questions and Answers" Pamphlet, January, 1966 have been drawn upon in both their formats and contents as there are many basic similarities in the three retirement systems.

Users of this pamphlet are cautioned that although the information contained herein is valid for most cases, in some instances, because of unique circumstances and/or security considerations, it may not apply.



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## I. CIA RETIREMENT AND DISABILITY SYSTEM

1. What is the CIA Retirement and Disability System?
2. What is the current statutory basis for the CIA Retirement and Disability System?

This is the retirement system established by the Central Intelligence Agency Retirement Act of 1964 for Certain Employees, as supplemented by regulations prescribed by the Director.

The statutory basis for the system is Public Law 88-643 (50 U.S.C. 403 Note).

## II. THE CIA RETIREMENT AND DISABILITY FUND (Hereafter referred to as "the Fund")

3. What is the CIA Retirement and Disability Fund?
5. How is money in the Fund invested?

It is the accumulation of resources comprised principally of investments in U.S. securities and money on deposit in the U.S. Treasury which are available for the payment of benefits under the CIA Retirement System.

The Director of CIA may, with the approval of the Secretary of the Treasury, invest in interest-bearing securities of the United States such portions of the Fund as are not immediately required for the payment of annuities, cash benefits, refunds and allowances.

4. From what source is money for the Fund derived?

It may come from five main sources: (1) deductions from the salaries of participants of the CIA Retirement and Disability System; (2) contributions by the Agency in amounts which match the deductions from participants' salaries; (3) transfer from the Civil Service Commission of an employee's Civil Service retirement deductions upon his designation as a CIARDS participant; (4) interest earned through the investment of money derived from the foregoing three sources; and (5) U.S. Government appropriations when required.

6. How much is deducted from the salary of participants in the CIA Retirement System?

Six and one-half per cent of the basic salary.

7. Has the employee contribution always been six and one-half per cent of the basic salary?

YES. The contribution rate was established as 6½% when the CIA System was enacted in October 1964.

8. What is meant by "basic salary"?

Basic salary for CIA employees is the pay or compensation set by law or

regulation. It does not include overtime pay, military pay, cash awards, holiday pay, overseas allowances and differentials, or other compensation given in addition to the basic pay of the participant. It does include periodic salary increases and quality step increases.

**9. How is the Government contribution to the Fund made?**

From the appropriation used for the payment of the participant's salary, a sum equal to the contribution made by each employee (6½%) is contributed by the Agency. In addition, it can be made by direct appropriations. The CIA Director of Finance prepares estimates of the annual ap-

propriations required to be made to the Fund and causes to be made actuarial valuations of the Fund at intervals of five years, or more often if deemed necessary by him.

**10. May a participant pay money other than compulsory salary deductions into the Fund?**

YES. He may pay to cover periods of prior civilian service for which no deductions were made or for periods of prior civilian service for which he received a refund. This is required before this service can be credited in the computation of the participant's annuity. (See also Section VI "Voluntary Contributions.")

### III. MEMBERSHIP

**11. Does an individual automatically become a participant in the CIA Retirement and Disability System by virtue of his employment with the Agency?**

NO.

**12. What conditions must be fulfilled in order for an employee to qualify for designation as a participant in the CIA Retirement and Disability System?**

The following pre-requisites must be met in order to qualify for designation as a participant. He must:

- a. Be at least 25 years of age;
- b. Have successfully completed three years of Agency service;
- c. Have signed a written obligation to serve anywhere and at any time according to the needs of the Agency;
- d. Be serving on a career basis in a field which normally requires the

performance of qualifying service as an integral part of a career in that field;

- e. Have performed qualifying service or be under official orders for an assignment requiring the performance of qualifying service; and,
- f. Have sufficient time prior to completion of 15 years of service with the Agency within which he could complete a minimum of 60 months of qualifying service or if he has completed 15 years of service with the Agency, have performed 60 months of qualifying service.

**13. What constitutes "Qualifying Service"?**

Qualifying service is defined in the Retirement Act and supplemented by Headquarters regulation. It may be defined generally as involving duties determined by the Director to be in

support of Agency activities abroad hazardous to life or health, or so specialized because of security requirements as to be clearly distinguishable from normal government employment.

**14. What are the "minimum periods" of qualifying service?**

The following standards are used in determining an employee's eligibility for continuing designation as a participant:

- 5 years as a participant: 18 months of qualifying service
- 10 years as a participant: 36 months of qualifying service
- 15 years Agency service: 60 months of qualifying service

**15. Once an employee is designated as a participant, is his status as such permanent?**

NO, with the exception covered in Question 17. A participant may remain under the System only if he continues to meet the criteria for participation, including the performance of minimum periods of qualifying service.

**16. Are there any exceptions to the minimum period requirement for participants?**

YES. If, at the time of review, the minimum periods requirement has not been met, an individual may still remain a participant if (1) he is then serving on an assignment which will satisfy the qualifying service requirement indicated for the review involved, or (2) he is under official orders to serve in such an assignment within 90 calendar days, or (3) at the time of the 15th anniversary review he has sufficient time prior to the completion of 15 years of service with the Agency within which he

could complete a minimum of 60 months of qualifying service.

**17. May a participant acquire permanent status in the CIA Retirement and Disability System?**

YES. Any participant whose career after fifteen years of service with the Agency is adjudged by the Director of Personnel to be qualified for the System may elect to remain a participant in the System for the duration of his employment by the Agency, and such election will not be subject to review or approval by the Director.

**18. Does the fact that an employee may not be eligible for the System after 15 years of Agency service preclude his being designated as a participant at a later time?**

NO. An employee may be considered for designation at any time during his career provided he meets all of the criteria for designation specified in the answer to Question 12 and has performed the required periods of qualifying service. The employee may at any time initiate the request for consideration.

**19. May a former participant again be considered for designation?**

YES, at such time as he meets all of the criteria for designation specified in the answer to Question 12 and has performed the required periods of qualifying service.

**20. May an employee who, at the time of his fifteen year election, chooses not to enter the System or a participant who elects to leave the System, later become a participant?**

NO, as a general rule.

**21. May a participant, prior to the date of his retirement, elect to transfer out of the System?**

Not as a matter of right; however, the policy has been to permit a participant whose annuity at the time of retirement would be higher under the Civil Service to apply for transfer to that System prior to retirement. (As the Civil Service System requires at least one year of coverage immediately preceding retirement, application for transfer should be made approximately 18 months prior to a participant's anticipated retirement date.)

**22. Under what conditions would a participant's annuity be higher under the Civil Service Retirement System?**

Only in cases where a participant has more than 36 years, 10 months of Federal service. (Under the CIA System, the maximum allowed is 70% of the individual's high-five average salary; under the Civil Service System the maximum is 80%.)

**23. May persons in the military service of the United States be participants in the CIA Retirement and Disability System?**

NO. However, participants in the System who leave the Agency to enter the Armed Forces for active duty, under circumstances spelled out in the Retirement Act, may retain their status as participants while in the military service.

#### IV. CREDITING OF CIVILIAN SERVICE

**24. What types of civilian service are creditable for retirement purposes under the CIA Retirement and Disability System?**

Credit is given for all service performed as an employee of the Federal Government or of the District of Columbia Government provided appropriate contributions are made to the Fund to cover such service. Generally, no credit may be allowed for service in which a participant acquired Social Security coverage under the 1954 Amendment to the Social Security Act.

**25. Must the service involved be consecutive, or may separate periods of service be counted?**

Service is creditable, regardless of breaks in employment.

**26. May periods of separation from service be counted?**

NO, except that any separation which is three calendar days or less is not considered a break in service.

**27. May credit be allowed for periods of service during which no retirement deductions were taken?**

Yes, provided a special contribution is made to the Fund to cover the service for which credit is sought.

**28. Is a special contribution required to obtain credit for periods of service for which a refund of retirement deductions was made?**

YES.

CREDITING OF MILITARY SERVICE

5

**29. How is the amount of the special contribution determined?**

Depending upon the periods when the service was performed, the contribution is made up of the regular deductions (see table below).

- 2½ % from August 1, 1920 – June 30, 1926
- 3½ % from July 1, 1926 – June 30, 1942
- 5 % from July 1, 1942 – June 30, 1948
- 6 % from July 1, 1948 – October 31, 1956 and
- 6½ % thereafter plus interest at the rate of 4% to December 31, 1947, and 3% thereafter, compounded annually.

**30. Is it to a participant's advantage to make the special contribution?**

Normally, yes, unless he already has the maximum of 35 years service.

**31. When must the special contribution be made to the Fund to cover prior service?**

The contribution must be made to the Fund prior to retirement.

**32. Does the date of payment affect the amount of the special contribution?**

YES. The longer payment is delayed the more it will cost because of the accrual of interest.

**33. How may the special contribution be made?**

The participant must submit his Application to Purchase Service Credit (Form 3107) through the Office of Personnel. The participant is then informed of the amount required to purchase previous service credit, payment of which may be made in a lump sum, or if the participant so desires, in installments or payroll allotments in multiples of \$25.

**34. In case of death of a participant, may a survivor entitled to annuity benefits make the deposit or redeposit?**

YES.

**35. Is credit allowed for leave without pay?**

Credit is given without deposit to the Fund for so much of leave without pay as does not exceed six months in any calendar year.

**36. Is there any exception to this rule?**

YES. If the employee is carried on leave without pay while receiving benefits under the Federal Employee's Compensation Act or while serving with the Armed Forces under circumstances spelled out in the Retirement Act, the entire period (subject to the limitations explained in Questions 54 and 55) is creditable without deposit to the Fund.

**V. CREDITING OF MILITARY SERVICE**

**37. What does the term "military service" cover?**

Service in the Army, Navy, Air Force, Marine Corps, and Coast Guard including the service acad-

emies, and, after June 30, 1960, in the Regular Corps or Reserve Corps of the Public Health Service, and after June 30, 1961, as a commissioned officer of the Coast and Geodetic Survey.

**38. Is military service creditable for Agency retirement purposes?**

As a general rule, military service is creditable provided it was active service, was terminated under honorable conditions, and was performed before separation from a civilian position under the retirement system. For exceptions to this general rule, see the Questions immediately following.

**39. Are periods of lost time (for example, AWOL, confinement, etc.) creditable as active military service?**

NO. All such time during an enlistment must be deducted from the total time covered by the enlistment.

**40. Does the receipt of pension or compensation under laws administered by the Veterans' Administration bar the crediting of military service?**

NO. Regardless of the length of time on which the pension or compensation is based, or the reason for its allowance, full credit is given for the military service.

**41. Does the receipt of military retired pay bar the crediting of military service?**

YES, unless the retired pay is:

- a. Based on a disability incurred in combat with an enemy of the United States or caused by an instrument of war and incurred in the line of duty during a period of war; or
- b. Granted under the provisions of Chapter 67, Title 10, U.S. Code (formerly Title III of Public Law 80-810).

**42. What is Chapter 67, Title 10, U.S. Code?**

It is a provision granting retired pay to members of reserve components of the Armed Forces on the basis of service instead of disability. The basic requirement is the attainment of age 60 with the completion of 20 years satisfactory service.

**43. What agency administers Chapter 67, Title 10, U.S. Code?**

The Department of Defense.

**44. Is it possible to receive military retired pay and Agency annuity at the same time, using the same period of military service?**

YES, under the conditions outlined in Question 41. Only the portion of the service which was in active status, however, may be credited toward Agency retirement.

**45. May military retired pay be waived so that military service will be credited under the Agency Retirement System?**

YES. (However, because of Social Security coverage of the military which began 1 January 1957, in many instances waiver of military retired pay may not be to the advantage of a participant. A qualified Agency retirement counselor should be consulted before such a waiver is initiated.)

**46. Does receipt of social security benefits bar credit for military service?**

Receipt of social security benefits has no effect on granting credit for military service performed before January 1, 1957, but use of such military

service for credit under the retirement system will bar its use for social security wage credits. However, military service (except while on military leave with pay from a civilian position) performed after December 31, 1956, may not be credited toward Agency retirement if the employee or his widow or child receives or is eligible to receive monthly old age or survivors' social security benefits based on his wages or self-employment income.

**47. May military service be credited toward retirement rather than toward social security?**

Credit will automatically be given under the Agency Retirement System for military service performed before January 1, 1957. Credit may be given under the Agency Retirement System for military service performed on or after January 1, 1957, only if the employee is not eligible for social security old age benefits.

**48. When is an employee eligible for social security so as to disqualify him from receiving credit toward retirement for military service performed on or after January 1, 1957?**

If an employee has earned sufficient credits to qualify him for social security, he will be eligible to draw benefits at age 62. At this age an employee is considered eligible for social security even though he does not apply for it, or having applied, is not receiving any benefit. However, social security benefits paid on account of disability are not disqualifying until converted to old age benefits, generally at age 65.

**49. If an employee retires before he is eligible for social security, may he receive credit toward retirement for military service performed on or after January 1, 1957?**

YES. Credit for the military service will be allowed during the time the employee is not eligible for social security. If he becomes eligible for social security after he retires, his annuity will at that time be recomputed to exclude credit for the military service.

**50. What choice does an employee's widow (or widower or dependent child) have between crediting military service toward retirement or toward social security?**

She has no choice with regard to military service performed on or after January 1, 1957; if she is eligible for social security, then the military service cannot be credited under the Agency Retirement System. With regard to military service before January 1, 1957, she does have a choice; she can choose to have the military service used under the Agency Retirement System or credited toward the social security benefit.

**51. What is the effect of an election by a widow (or widower or dependent child) to credit military service performed before January 1, 1957, toward social security rather than using it for retirement, and vice versa?**

If the widow elects to credit such military service toward social security, she cannot receive any survivor



annuity under the retirement system. If she elects to use the military service for retirement, she may still be eligible to receive social security if there is sufficient other covered employment but no credit for the military service will be allowed in computing the amount of the social security benefit.

52. When would it be to the advantage of a widow (or widower or dependent child) to use military service before January 1, 1957, for retirement and receive a survivor annuity?

This depends on the circumstances in the individual case. Since a choice to use military service for retirement cannot be changed, the widow should get statements from her nearest social security office and from the CIA Director of Personnel as to exactly what benefits would be payable under each system. She can then compare the benefits and choose the one which is to her advantage.

53. Is deposit required for military service?

NO. Full credit is given for military service without any deposit to the retirement fund.

54. What credit is given if a civilian employee is placed on furlough or leave without pay to enter the military service?

The entire furlough period is credited, without deposit, as civilian service if it ended no later than December 31, 1956. If it ended after December 31, 1956, full credit is allowed for the furlough period up to a maximum of 5 years.

55. May military furlough periods be credited as civilian service if credit for the military service itself is barred because the employee is receiving military retired pay or is entitled to social security?

NO.

56. How does payment of a refund affect a military furlough?

If a participant applies for and receives a refund of his deposit in the Fund while on military furlough, his employment with the Agency will be considered terminated for the purposes of the CIA Retirement Act.

57. Is military service creditable if it is performed after final separation from civilian employment?

NO. Such service may be credited only if the individual again becomes a member of the retirement system.

58. Do the provisions on the crediting of military service which are explained in this section apply to service performed with women's organizations such as the WAC, WAVES, etc.?

YES.

59. Is service with the Women's Auxiliary Army Corps (WAAC—replaced by WAC) creditable?

YES. However, it is creditable as civilian rather than as military service.

60. May an employee receive credit for service with the National Guard?

Only when the organization (or unit) is actually mustered into, or activated in, the U.S. Army or Air Force. Training periods or other service performed for a State government, or when the National Guard is called for duty by the Governor of a State, is not creditable.

## VI. VOLUNTARY CONTRIBUTIONS

**61. May a participant make voluntary contributions to the retirement fund in addition to the compulsory contribution?**

YES. Such voluntary contributions are made for the primary purpose of increasing the annuity at the time of retirement. These contributions, in multiples of \$5, may not exceed 10 percent of the basic salary for current service as a participant. Voluntary contributions may also be made for any period of prior service for which a participant has purchased service credit under the System but not exceeding 10 percent of participant's basic salary during the period of service covered.

**62. Is the privilege of making voluntary contributions open to all participants?**

YES.

**63. Do voluntary contributions earn interest?**

YES. The amounts deposited earn interest at 3 percent compounded annually. No interest is earned after a participant's employment under the retirement system terminates, nor is interest paid during the interim period between separation and eligibility for deferred annuity.

**64. May a participant make voluntary contributions after separation from the Agency?**

NO.

**65. May an employee make voluntary contributions based on his military pay?**

NO.

**66. How do voluntary contributions made by a participant affect his annuity?**

The annuity which the voluntary-contribution account (contributions with interest) will purchase is added to the regular annuity.

**67. How much additional annuity may be purchased with the voluntary contribution account?**

The amount is calculated from tables of mortality prescribed from time to time by the Director of Finance for this purpose, and varies according to age of the participant, age of beneficiary, if any, the amount invested, and whether a guaranteed return of the unexpended principal is elected. (See examples on page 10.)

**68. Has the retiring employee a choice as to the type of annuity purchased with his voluntary contribution account?**

YES. The voluntary contribution account shall, at his election, be used:

- a. to purchase an additional life annuity;
- b. to purchase an additional life annuity for himself and to provide for a cash payment on his death to a beneficiary whose name shall be notified in writing to the Director by the participant; or
- c. to purchase an additional life annuity for himself and a life annuity commencing on his death payable to a beneficiary whose name shall be notified in writing to the Director of Personnel by the participant with a guaranteed return to the beneficiary or his legal representative of an amount

**ADDITIONAL ANNUITY BASED  
ON VOLUNTARY CONTRIBUTIONS**

- A. Participant elects a monthly single life income, with no guaranteed return of unexpended principal:

*Example:*

Male participant age 60 retires with \$9,863.46 of accumulated voluntary contributions. His purchasable monthly income would be \$64.90.

- B. Participant retiring at age 58 with voluntary contributions of \$10,486.39 elects monthly single life income, with guaranteed return of unexpended principal. Under present interpretation, retiring participant may invest all, any part, or none of his accumulated voluntary contribution.

*Example 1:* Invests all—monthly income \$56.21.

*Example 2:* Invests part (say \$5,486.39) with guaranteed return of unexpended principal and leaves \$5,000 as a lump sum payable upon death. Monthly income \$41.74.

*Example 3:* Invests part (say \$5,486.39) with no guaranteed return of unexpended principal and leaves \$5,000 as a lump sum payable upon death. Monthly income \$46.13.

*Example 4:* Leaves entire amount as lump sum payable upon death. Monthly income \$25.86.

- C. Male participant retires at age 58 with voluntary contributions of \$10,000. He could purchase for himself a monthly income of \$61.60. Instead he decides to elect a joint and survivor annuity with no guaranteed return. His wife is 56 years of age.

*Example 1:* If he elects an equal annuity for himself and his wife, the amount would be \$45.97.

*Example 2:* If he elects that his wife's annuity be equal to one-half of his reduced (additional) annuity, his additional annuity would be \$52.66 per month and his wife's annuity would be \$26.33 per month.

equal to the cash payment referred to in subparagraph (b) above.

69. What disposition is made of any balance in the voluntary contribution account if an employee dies in the service?

All of the voluntary contribution account is payable immediately in a lump sum. No part of this account

may be used in computing the annuity which may be due a widow, widower, or children.

70. What disposition is made of any balance in the voluntary contribution account remaining at the death of the annuitant?

The disposition would be in accordance with the option elected by the

annuitant at the time of retirement. The options are as described under Question 68 and examples of payment are on page 10.

**71. May a participant withdraw his voluntary contribution account?**

YES. A participant may withdraw his voluntary contributions and interest at any time he becomes separated from the Agency for any reason prior to retirement on an annuity.

**72. Is it to the employee's advantage to make voluntary contributions?**

This is a question which an employee must decide for himself. Voluntary contributions are an investment and should be compared to other available investment opportunities. Here are some of the facts an employee should consider in deciding whether to make voluntary contributions.

- a. The return of voluntary contributions plus accrued interest is guaranteed. This return may be in the form of a refund to the employee, additional retirement and survivor annuity, or as a lump sum death benefit.
- b. Voluntary contributions will provide an increased retirement income in a predetermined amount. For example, if an employee wishes an annuity income of \$300 a month but his regular annuity will be only \$250, he can make voluntary contributions in an amount which is sufficient to pro-

vide additional annuity of \$50 a month.

- c. Voluntary contributions do not have to be made at regular intervals. They may be made at the employee's convenience. Also, they may be made in varying amounts which can be as little as \$5.
- d. Voluntary contributions may be made by payroll deduction.
- e. Many other investments offer a greater interest return than the 3 percent paid on voluntary contributions. Some of these investments, however, may involve greater risk than voluntary contributions.
- f. The ultimate advantage of voluntary contributions depends on the number of years over which the additional annuity purchased by the contributions will be paid. In other words, it depends on how long after retirement the employee (and his survivor, if the additional annuity is shared) will live and draw the additional annuity. The table below shows the life expectancy of the average employee who retires for reasons other than disability.

Age	Life expectancy	
	Men	Women
55	21	26
60	17	22
62	16	21
65	14	18
70	11	14

## VII. RETIREMENT ELIGIBILITY

**73. How many kinds of retirement are provided for in the CIA Retirement and Disability System?**

Five. They are: Voluntary, Involuntary, Mandatory, Disability and Deferred retirement.

**74. Is there a minimum requirement as to the amount of civilian service?**

YES. Five years of civilian service are required before annuity benefits may be paid in any case.

**75. Is there a mandatory retirement age under the CIA Retirement and Disability System as implemented by regulation?**

YES. All participants are subject to mandatory retirement upon reaching age 60.

**76. May the services of participants be extended beyond the normal mandatory age?**

YES. Whenever the Director shall determine it to be in the public interest.

**77. When does the annuity begin for a participant who has separated and who is eligible for an immediate annuity?**

It begins as of the first day following the month in which the participant was separated and is payable on the first day of the month following that for which it accrued.

**78. Under what conditions may a participant retire for disability?**

Any participant who has five years of civilian service credit toward retirement under the System and who becomes totally disabled incapacitated for useful and efficient service by reason of disease, illness or injury not due to vicious habits, intemperance or willful misconduct on his part may be retired on an immediate annuity.

**79. Who determines whether a participant is totally disabled so as to qualify for annuity?**

a. When the participant has made application, such determination will be made by the Director of Personnel based on the advice of the Director of Medical Services.

b. When disability retirement action is initiated by the Director of Personnel on behalf of the participant, such retirement shall be only upon order of the Director of Central Intelligence who shall also make the determination as to whether the disability is permanent, based on the advice of the Director of Medical Services.

**80. What determinations are made regarding total disability subsequent to retirement?**

Unless disability is determined to be permanent at the time of retirement, annual medical examinations are required until the disability is determined to be permanent or until the annuitant has reached his mandatory retirement age.

**81. Must the annuitant pay for these medical examinations?**

NO. Costs of these examinations, including reasonable travel and other expenses incurred in order to submit to examinations, are paid out of the Fund.

**82. What happens if the annuitant recovers from the disability upon the basis of which he is retired?**

If the Director of Personnel determines on advice of the Board of Medical Examiners that an annuitant has recovered to the extent that he can return to duty, payment of the annuity will continue until a date six months after the date of the examination showing recovery or until the date of re-employment in the Agency, whichever is earlier.

**83. When an annuitant fails to submit to examinations as required, what happens?**

Payment of annuity will be suspended until continuance of the disability is satisfactorily established.

**84. Must an annuitant who is determined to be recovered repay any of the disability annuity received in order to qualify for reinstatement or reappointment or for an annuity at some future time?**

NO.

**85. Who may initiate retirement action for disability?**

Retirement action may be initiated by:

- (a) Any participant who is of the opinion that he may be eligible for retirement because of disability by applying in writing to the Director of Personnel for such retirement; or
- (b) The Director of Personnel in the event a participant appears to be totally disabled or incapacitated, but fails or is unable to make application for disability retirement.

**86. Who is eligible for voluntary retirement?**

Any participant who reaches age 50 with 20 years of creditable federal service, 10 years of Agency service and 5 years of qualifying service is eligible to retire voluntarily, with concurrence of the Director.

**87. Who may be involuntarily retired?**

The Director may at his discretion place in a retired status any participant who has completed at least 25 years of service, or who is at least age 50 and has completed at least 20 years of service, provided that in either case such participant has not less than 10 years of Agency service of which at least 5 years shall have been qualifying service.

**88. Who is eligible for a deferred annuity?**

Any participant who, after completing at least 5 years of creditable civilian service, voluntarily separates from the Agency, or is separated for cause (except in cases where separation is determined by the Director to be based in whole or part on the grounds of disloyalty to the United States) may elect to receive a deferred annuity upon reaching age 62.

**89. When does a deferred annuity begin?**

It begins on the first day of the month following the month in which the separated participant reaches age 62.

**90. What happens if a separated participant entitled to deferred annuity dies before reaching age 62?**

His contributions to the Fund, with interest, shall be paid to his designated beneficiary, or, in the absence of a designated beneficiary, as prescribed in Question 141.

## VIII. TYPES OF ANNUITIES

**91. How many types of annuities may be elected under the CIA Retirement and Disability System?**

Three. These are known as: (1) full annuity; (2) reduced annuity with benefit to surviving wife or husband; and (3) reduced annuity to design-

nated beneficiary or an unmarried participant.

**92. What is an annuity without survivor benefits?**

It is a full annuity elected by the retiring participant which makes no provision for a survivor and is ordinarily payable to the retiring participant for the remainder of his life unless it is terminated for reasons such as recall or recovery from disability. Under this type, which any retiring participant may choose, no survivor annuity is payable unless the annuitant at his death leaves dependent children.

**93. What is "reduced annuity"?**

In this type, the retiring participant takes a reduction in his annuity and names his wife (or her husband), or in the case of an unmarried participant, a designated beneficiary, to receive a survivor annuity.

**94. Who may elect a reduced annuity with benefit to widow or widower?**

Any participant, including one who is eligible to receive a deferred annuity at age 62, may choose this type if married at the time his annuity is scheduled to begin. (See also Section XI, Death Benefits.)

**95. When does the survivor annuity to the widow or widower begin?**

It commences on the day following the annuitant's death.

**96. Under what conditions may a survivor annuity to widow or widower be terminated?**

Upon the death or remarriage of such surviving widow or widower.

**97. How much survivor annuity does the widow or widower receive?**

The annuity payable to the surviving wife or husband after such annuitant's death is 55% of the amount specified by the annuitant as the base for survivor benefits.

**98. If a participant elects a reduced annuity with annuity to surviving spouse, how much is the reduction of his annuity?**

That depends on how much of his annuity he chooses as a base for the survivor annuity. The reduction is 2½ percent of the first \$3,600 chosen as a base plus 10 percent of any amount over \$3,600. For example, assuming his annuity is \$4,800, if the retiring employee chooses \$2,400 as a base, the reduction in his annuity would be 2½ percent of \$2,400 (\$60 a year); if he chooses, \$3,600 as a base, the reduction in his annuity would be 2½ percent of \$3,600 (\$90 a year); if he chooses \$4,800 as a base, the reduction in his annuity would be 2½ percent of the first \$3,600 (\$90 a year) plus 10 percent of the \$1,200 balance (\$120 a year), a total reduction of \$210 a year.

**99. Does the age of a wife or husband who is named as survivor annuitant affect the rate of annuity?**

NO.

**100. Must the retiring participant be married for a specific number years in order to be able to name a spouse as survivor beneficiary?**

NO. The participant must be married at the time of retirement, or

in the case of deferred annuity the person must be married at the time deferred annuity is scheduled to begin. (See also answers to Questions 124 and 125.)

**101. Is there any provision for survivor annuity to child or children?**

YES. Each eligible child shall automatically receive an annuity. (For eligibility see answer to Question 127.)

**102. How much survivor annuity will the eligible child or children receive?**

- a. When there is a surviving wife or husband, whether or not receiving an annuity, each child shall receive an annuity equal to the smallest of:
  - (1) 40 percent of the annuitant's high-five salary divided by the number of children;
  - (2) \$714.00; or
  - (3) \$2142.00 divided by the number of children.
- b. When there is no surviving wife or husband, each child shall be paid an annuity equal to the smallest of:
  - (1) 50 percent of the annuitant's high-five salary divided by the number of children;
  - (2) \$856.80; or
  - (3) \$2570.40 divided by the number of children.

\*Figures cited in a. (2) & (3) and b. (2) & (3) above are subject to change with future cost-of-living increases.

**103. Who may elect a reduced annuity with benefit to a person other than a spouse?**

At the time of retirement any unmarried participant who has satis-

factorily passed a physical examination may elect to receive a reduced annuity and provide for an annuity payable after his or her death to a beneficiary designated in writing to the Director of Personnel. The beneficiary so designated must be a person having an insurable interest in the participant.

**104. When does the annuity of a "designated beneficiary" begin?**

The annuity payable to a beneficiary shall begin on the first day of the next month after the annuitant dies and continues for the life of the beneficiary.

**105. How much annuity will a "designated beneficiary" receive?**

The annuity of a survivor designated under this provision shall be 55% of the reduced annuity payable to the participant.

**106. If a retiring participant elects to provide an annuity for a "designated beneficiary" how much is the reduction of his annuity?**

The annuity payable to the participant making such election shall be reduced by ten percent of his annuity and by five percent of an annuity so computed for each full five years the person designated is younger than the participant, but such total reduction shall not exceed 40 percent.

Age of person named in relation to that of retiring participant	Reduction in annuity of retiring participant
Older, same age, or less than 5 years younger	Percent
5 but less than 10 years younger	10
10 but less than 15 years younger	15
15 but less than 20 years younger	20
20 but less than 25 years younger	25
25 but less than 30 years younger	30
30 or more years younger	35
	40

**107. Can an annuitant change the type of annuity after retirement?**

NO.



## IX. ANNUITY COMPUTATION

**108. How is the amount of a participant's annuity determined?**

The annuity of a participant shall be equal to two percent of his average basic salary for the highest five consecutive years of service for which full contributions have been made to the Fund multiplied by the number of years, not exceeding thirty-five, of Federal service to his credit.

**109. How is a participant's length of service figured?**

All periods of creditable service (this includes service for which full contributions have been made to the retirement Fund plus free military service) are added together. The odd days in the total are dropped and the time (years and months) remaining is the length of service used in the annuity computation formula.

**110. Is there any limitation to the length of service which may be credited?**

YES. Only 35 years of creditable civilian and military service may be counted in the computation of annuity.

**111. How is a participant's average salary for the highest five consecutive years figured?**

The high-five salary is the highest salary obtainable by averaging the rate of basic salary in effect during any five consecutive years of service, with each rate weighed by the time it was in effect.

**112. Upon what basis is a disability annuity computed?**

The same as described in Question 108, however, if the participant is under age 60 and has less than 20 years of service credit at the time he is retired, his annuity is computed on the assumption that he has had twenty years of creditable service, but the additional service credit that may accrue to a participant under this provision shall in no case exceed the difference between his age at the time of retirement and age 60. This is called the "guaranteed minimum" disability annuity.

**113. May annuities be adjusted after retirement to take care of future cost-of-living increases?**

YES. Under current law, adjustments will be identical with increases under the Civil Service Retirement System.

## X. RE-EMPLOYMENT OF ANNUITANTS

**114. May an annuitant be employed outside the Federal Government?**

YES.

**115. May an annuitant be re-employed in the Federal Government?**

YES. Re-employment in the Federal Government in this sense should not be confused with "Recall, Reinstatement or Reappointment" to Agency service. See Questions 116 and 117.

**116. What effect does re-employment in the Federal Govern-**

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ment have on annuity payment? YES.

A re-employed participant is entitled to receive his annuity payable under the System, but there is deducted from his salary a sum equal to the annuity allocable to the period of actual employment.

117. What happens to the annuity of a retiree who is reinstated, recalled or reappointed as an Agency employee?

He shall be entitled in lieu of his annuity to the full salary of the grade in which he is serving. The annuity of such employee is terminated the day preceding recall, reinstatement or re-employment.

118. Is the annuity computed anew when he is subsequently separated from the Agency?

119. Does such recalled participant have the right of a new election regarding survivorship benefits when he again retires?

YES.

120. What responsibility does an Agency retiree have when he is re-employed in the Federal Government?

If security considerations clearly permit, he must inform the agency in which he is re-employed that he is an Agency annuitant and that agency must then adjust his salary payments accordingly. Otherwise he must seek guidance from the Office of Personnel.

## XI. DEATH BENEFITS

121. What kind of death benefits are payable when a participant dies in service?

There are two kinds: (1) A survivor annuity benefit which begins on the day following the death of the participant, and is payable in monthly installments; (2) A lump-sum benefit which is paid only once.

122. To whom is a survivor annuity payable?

Under certain conditions a survivor annuity may be payable to the widow (or widower) and dependent children of the deceased participant or deceased annuitant. It may also be payable to a person having an insurable interest and who was

named by the annuitant upon retirement.

123. What conditions must the deceased participant have met to permit payment of a survivor annuity?

He (or she) must have completed at least 5 years of civilian service and must have been a participant in the System at the time of death.

124. Under what conditions is the widow of a participant who dies in service eligible for a survivor annuity?

She must have been married to such participant for at least two years immediately preceding his death, or if

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married less than two years, be the mother of his child born of the marriage.

- 125. Under what conditions is a dependent widower of a participant who dies in service eligible for a survivor annuity?**

He must have been married to such participant for at least two years immediately preceding her death or be the father of her child born of the marriage. In addition, he must be incapable of self-support by reason of mental or physical disability and must have received more than one-half of his support from the deceased participant.

- 126. How is the annuity for surviving spouse computed upon the death in service of a participant.**

The survivor annuity is 55% of the participant's earned annuity.

- 127. Under what conditions is the child of a participant who dies in service eligible for survivor annuity?**

The child must be unmarried and under age 18 (a child who is over 18 may be eligible if he or she is incapable of self-support because of physical or mental disability which began before age 18), or such unmarried child between 18 and 21 years of age must be a student regularly pursuing a full-time course of study or training in residence in a high school, trade school, technical or vocational institute, junior college, university, or comparable recognized educational institution.

- 128. Is an adopted child eligible for a survivor annuity?**

Any legally adopted child is eligible if he meets the conditions stated in Question 127.

- 129. May a stepchild be eligible for a survivor annuity?**

YES. A stepchild must meet the conditions stated in Question 127. In addition, the child must have received more than one-half support from the deceased participant and have been living with the participant in a child-parent relationship.

- 130. May an illegitimate child be eligible for survivor annuity?**

YES. Such a recognized child would be eligible under the same conditions as a stepchild (see Question 129).

- 131. Is a child survivor annuity payable in addition to the widow's annuity?**

YES. For example, if a participant who dies in service is survived by a widow and three children all of whom were eligible to receive survivor annuities, annuity benefits would be paid to all four survivors.

- 132. If a widow (or widower) annuitant dies, will the children's annuities be increased?**

YES. If the children are still drawing annuities, their payments will be increased as though the participant had not been survived by a widow (or widower).

- 133. If the annuity of one child stops for any reason, what happens to the annuity of any remaining children?**

The other children's annuities are recomputed as though the one child had never been eligible.

**134. When a child's annuity stops, is the widow's (widower's) annuity affected?**

NO.

**135. When does the survivor annuity of a widow (or widower) begin?**

Such annuity begins on the day following the day of the death of the participant or annuitant.

**136. How long will the widow (or widower) continue to receive the survivor annuity?**

The surviving spouse of an annuitant receives an annuity until death or remarriage. The annuity of a dependent widower of a participant who dies in the service continues until he remarries, dies, or becomes capable of self-support.

**137. When does the survivor annuity of a child begin and when is it terminated?**

The annuity begins on the day after the participant or annuitant dies and is terminated when the child dies, marries or attains the age of 18 years, except that if the child is incapable of self-support by reason of mental or physical disability, the annuity is terminated only when such child dies, marries or recovers from such disability. In addition, a child's annuity will continue between the age of 18 and 21 years if he is a student regularly pursuing a full-time course of study or training in residence in a high school, college or comparable recognized educational institution.

**138. Is there any survivor annuity benefit for a spouse who marries a participant after he or she retires?**

NO. However, an annuity vests in a child born subsequent to retirement if such child qualifies.

**139. Under what conditions is a lump-sum payment payable immediately after the death of a participant or an annuitant?**

A lump-sum benefit is payable immediately if the deceased participant had less than five years of civilian service, or had completed five years but leaves no widow (or dependent widower) or children who are eligible for survivor annuity. If an annuitant who did not elect a survivor benefit dies, leaving no children eligible for benefits, before he has received in annuity payments that amount of his contributions to the Fund, the remainder is payable in a lump-sum.

**140. May a lump-sum benefit be paid if the participant leaves a widow (or dependent widower) or children who are eligible for survivor annuity?**

No lump-sum benefit may be paid while the widow (or dependent widower) or children are eligible for a survivor annuity unless there are voluntary contributions in the deceased participant's account. If, when the annuities of all the survivors have ended they have received in annuities the amount which totals less than the participant's compulsory contributions to the Fund, plus any accrued interest, the difference is payable as a lump-sum benefit.

**141. Who may receive lump-sum payments?**

In the absence of a designated beneficiary, if a valid claim to lump-sum

payment is established, it would be paid in the following order:

- (1) To the surviving wife or husband of such participant;
- (2) If neither of the above, to the child or children of such participant and descendants of deceased children by representation;
- (3) If none of the above, to the parents of such participant of the survivor of them;
- (4) If none of the above, to the duly appointed executor or administrator of the estate of such participant;
- (5) If none of the above, to other next of kin of such participant as may be determined by the Director of Personnel.

**142. Of what does the lump-sum payment consist?**

It consists of the amount paid into the CIA Retirement and Disability Fund plus any accrued interest. If a deceased participant's account includes voluntary contributions, that part is payable as a lump-sum immediately, even though survivor annuities are also payable. Compulsory contributions after annuities have ceased are payable in a lump-sum as described in Question 140.

**143. What should the participant do if the order of payment indicated in Question 141 will not carry out his wishes?**

If a participant elects to designate a beneficiary not in accordance with the order of precedence as listed in Question 141, he must make such designation in writing to the Director of Personnel.

## XII. REFUNDS

**144. What is meant by "refund"?**

A refund is the return to a former participant of money to his credit in the retirement Fund.

**145. Under what conditions is a refund payable?**

It is payable in the following circumstances:

- (a) When a participant is separated voluntarily or involuntarily from the Agency and is ineligible for a deferred annuity at age 62, because he has had less than five years civilian service.
- (b) When a participant is separated from the Agency and is entitled to a deferred annuity at age 62, but before reaching that age

elects to have the refund in lieu of an annuity.

- (c) When a participant elects, either at time of retirement or separation for reasons other than retirement, to receive his voluntary contributions in the form of a lump-sum.

**146. How is application for refund made?**

Application must be made in writing to:

Director of Finance  
Attention: Payroll Office

**147. If a participant who is eligible for deferred annuity elects to receive a refund at the time of his separation from the Agency,**

may he later redeposit the refund and receive an annuity at age 62?

NO. Payment of refund cancels the right to a deferred annuity. If, however, the participant is later re-employed by the Agency under conditions in which he would again be a participant, he must replace the amount previously refunded in order to receive service credit for the period covered by the refund.

148. Of what does a refund consist? It consists of deductions taken from the participant's salary, any special contributions made by him to purchase prior service credit, and any interest accrued on such sums. It may also include voluntary contributions.

149. May the contributions made by the Agency to the retirement fund be included in a refund to an individual?

NO. The Agency's contributions are to the Fund in general and are not credited to any individual employee.

150. What rates of interest are paid on contributions to the retirement Fund?

Interest on refunded compulsory contributions is computed at four percent per annum to 31 December 1947 and three percent per annum thereafter to 31 December 1956. Such interest is compounded annually and proportionately for the period served during the year of separation. No interest is payable after 31 December 1956.

151. May a participant designate a beneficiary for lump-sum payment?

YES. If a participant elects to designate a beneficiary for lump-sum payment he must do so in writing to the Director of Personnel. The designation of a beneficiary does not affect the right of any person who qualifies to receive survivor annuity benefits which are payable under the System.

152. May a participant who is prohibited from receiving an annuity under the provisions of 5 U.S.C. 2281 et seq. and 2283 (c) be paid a refund?

YES. (See also Question 162.)

### XIII. MISCELLANEOUS

153. How are benefits paid?

Payment of all benefits (annuity, refund and lump-sum payments) will normally be by U.S. Treasury check.

154. May annuity checks be negotiated under power of attorney?

YES, if the power of attorney is given to a bank or trust company. Banks usually have the necessary forms and are familiar with the in-

structions which are issued by the Treasury Department about power of attorney.

155. Can annuity, refund or lump-sum payments be attached in order to settle a judgment or other indebtedness?

NO. Such payments are not subject to attachment, levy, garnishment, or legal processes.

**156. Does this bar apply to indebtedness to the United States?**

NO. Amounts payable to a participant in an annuity or refund or as lump-sum payments may be used to settle a claim which the Government may have against the individual.

**157. May a participant voluntarily assign his retirement deductions as security for a loan or other purposes?**

NO.

**158. May a participant borrow from the retirement Fund?**

NO.

**159. Are annuity payments subject to Federal income tax?**

a. Annuity payments are tax free until the annuitant's contributions to the Fund have been exhausted unless the exclusion ratio formula, as provided by the Internal Revenue Code, is applicable. (The exclusion ratio formula is seldom used and only in cases where annuitant's contributions cannot be recovered within three years after retirement.)

b. Under present law, annuities paid on the basis of retirement for disability are authorized a "sick-pay" exclusion (up to \$100 per week) usually until age 60.

**160. May an individual receive an Agency annuity and annuity from another Federal retirement system at the same time?**

YES, if he has qualified for benefits under more than one system.

**161. If an annuitant serves on a jury, will his annuity be affected?**

NO.

**162. Under what conditions may a participant otherwise eligible for an annuity be denied such annuity?**

5 U.S.C. 2281 et. seq. and 2283 (c) prohibits payment of annuity to persons who have committed certain Federal offenses or acts, or who remain outside the United States for more than one year to avoid prosecution.

**163. Are the survivors of a participant disqualified from receiving an annuity if the participant himself was barred by the general requirements of 5 U.S.C. 2281 et. seq. and 2283 (c) which prohibits the payment of annuity to persons who have committed certain specific offenses or acts?**

YES.

**164. Under what other conditions may a participant who is eligible to receive a deferred annuity be denied such annuity?**

He may be denied such annuity if he is separated from the Agency for cause and if the separation is determined by the Director to be based in whole or in part on the grounds of disloyalty to the United States.

**165. May a participant receive an annuity and Social Security benefits at the same time?**

YES, if he has qualified for both benefits.

**166. May an employee keep his Federal Employee's Group Life Insurance after retirement?**

He retains his group life insurance only (not accidental death and dismemberment) without further cost to him if:

- a. He retires from a position in which he is insured;
- b. He does not convert to an individual policy when his insurance as an employee would otherwise terminate;
- c. He retires on an immediate annuity (one which begins to accrue not later than one month after the date insurance would otherwise cease); and
- d. His retirement is for disability or after at least 12 years of creditable service.

**167. Does the full amount of life insurance stay in force after retirement?**

Full coverage is maintained until age 65 at which time it is reduced by 2% each month. These reductions continue until the amount of insurance reaches 25% of the amount in force at retirement.

**168. May an employee keep his health benefits coverage after retirement?**

YES, providing he:

- a. Retires on an immediate annuity after 12 years or more of service or under the disability provisions of the retirement law; and

- b. Was enrolled in a plan under the health benefits program from the date of his first opportunity OR for the five years of service immediately preceding his retirement, whichever is shorter.

**169. If a participant or annuitant dies, may his survivors continue his health benefits coverage?**

YES, if:

- a. The deceased was enrolled for self and family at the time of his death;
- b. At least one family member is entitled to annuity as the survivor of the deceased; and
- c. The annuity of all survivors eligible for health benefits coverage is sufficient to pay the withholdings required for enrollment in a plan.

**170. Are retirees under the Agency system permitted any special benefits concerning selection of a retirement site?**

YES, whether retiring domestically or abroad. Such a participant may identify a retirement site or relocation address within the United States, its possessions or the Commonwealth of Puerto Rico, to which his household goods may be shipped at government expense. He will also be allowed travel costs to his elected retirement/relocation area for himself and his eligible dependents. Such travel shall not be deferred for more than six months after the employee's last day in pay status.



### RETIREMENT MONTHLY ANNUITY RATES (Computed at 2% for every year of service)

#### KEY TO ANNUITY RATES IN TABLE

A—Monthly annuity to retired employee if survivor benefit is not elected  
 B—Monthly annuity to retired employee with maximum benefit to surviving spouse  
 The maximum benefit to surviving spouse of retired employee, or benefit to widow or dependent widower of employee whose death occurs before retirement, is approximately 55% of rate A.

**NOTE.**— 1 Service for which retirement deductions were withheld and later refunded cannot be counted unless the refund is redeposited.  
 2 Rates shown are subject to reduction if service includes any civilian time after August 1, 1920, for which no retirement deductions were withheld or deposited. Monthly reduction in retired employee's annuity for this reason is  $\frac{1}{2}$  of 10% of the amount due as deposit. Monthly reduction for surviving spouse is 55% of monthly reduction in retired employee's annuity.  
 3 If retirement is on account of total disability, the rates shown as payable to the retired employee (A and B) are subject to increase if he qualifies for the guaranteed minimum disability annuity.

Years of Service	AVERAGE ANNUAL SALARY (5 Highest Consecutive Years)																												Years of Service
		\$7,000	\$8,000	\$9,000	\$10,000	\$11,000	\$12,900	\$13,000	\$14,000	\$15,000	\$16,000	\$17,000	\$18,000	\$19,000	\$20,000	\$21,000	\$22,000	\$23,000	\$24,000	\$25,000	\$26,000	\$27,000	\$28,000						
5	A	58	67	75	83	92	100	108	117	125	133	142	150	158	167	175	183	192	200	208	217	225	233	A	5				
	B	57	65	73	81	90	98	105	114	122	130	138	146	154	163	171	178	187	195	203	212	219	227	B					
6	A	70	80	90	100	110	120	130	140	150	160	170	180	190	200	210	220	230	240	250	260	270	280	A	6				
	B	68	78	88	98	107	117	127	137	146	156	166	176	185	195	205	215	224	234	244	254	263	273	B					
7	A	82	93	105	117	128	140	152	163	175	187	198	210	222	233	245	257	268	280	292	303	315	327	A	7				
	B	80	91	102	114	125	137	148	159	171	182	193	205	216	227	239	251	261	273	285	295	306	317	B					
8	A	93	107	120	133	147	160	173	187	200	213	227	240	253	267	280	293	307	320	333	347	360	373	A	8				
	B	91	104	117	130	143	157	169	182	195	208	221	234	247	260	273	286	299	311	322	335	347	358	B					
9	A	105	120	135	150	165	180	195	210	225	240	255	270	285	300	315	330	345	360	375	390	405	420	A	9				
	B	102	117	132	146	161	176	190	205	219	234	248	263	278	293	306	320	333	347	360	374	387	401	B					
10	A	117	133	150	167	185	200	217	233	250	267	283	300	317	333	350	367	383	400	417	433	450	467	A	10				
	B	114	130	146	163	178	195	212	227	244	260	276	293	308	322	338	353	367	383	398	412	428	443	B					
11	A	128	147	165	183	202	220	238	257	275	293	312	330	348	367	385	403	422	440	458	477	495	513	A	11				
	B	125	143	161	178	197	215	232	251	268	286	303	320	336	353	369	385	402	419	435	452	468	484	B					
12	A	140	160	180	200	220	240	260	280	300	320	340	360	380	400	420	440	460	480	500	520	540	560	A	12				
	B	137	156	176	195	215	234	254	273	293	311	329	347	365	383	401	419	437	455	473	491	509	527	B					
13	A	152	173	195	217	238	260	282	303	325	347	368	390	412	433	455	477	498	520	542	563	585	607	A	13				
	B	148	169	190	212	232	254	275	295	315	335	354	374	393	412	432	452	471	491	510	529	549	569	B					
14	A	163	187	210	233	257	280	303	327	350	373	397	420	443	467	490	513	537	560	583	607	630	653	A	14				
	B	159	182	205	227	251	273	295	317	338	358	380	401	421	443	464	484	506	527	547	569	590	610	B					

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15	A	175	200	225	250	275	300	325	350	375	400	425	450	475	500	525	550	575	600	625	650	675	700	A	15
	B	171	195	219	244	268	293	317	342	366	391	415	440	464	489	513	538	562	587	611	636	660	685	B	16
16	A	187	213	240	267	293	320	347	373	400	427	453	480	507	533	560	587	613	640	667	693	720	746	A	16
	B	182	208	234	260	286	311	335	358	383	407	430	455	479	502	527	551	574	599	623	646	671	694	B	17
17	A	198	227	255	283	312	340	368	397	425	453	482	510	538	567	595	623	652	680	708	737	765	793	A	17
	B	193	221	248	276	303	329	354	380	405	430	456	482	507	533	558	583	609	635	660	686	711	736	B	18
18	A	210	240	270	300	330	360	390	420	450	480	510	540	570	600	630	660	690	720	750	780	810	840	A	18
	B	205	234	263	293	320	347	374	401	428	455	482	509	536	563	590	617	644	671	698	725	752	779	B	19
19	A	222	253	285	317	348	380	412	443	475	507	538	570	602	633	665	697	728	760	792	823	855	886	A	19
	B	216	247	278	308	336	365	393	421	450	479	507	536	564	592	621	650	678	707	735	763	792	820	B	20
20	A	233	267	300	333	367	400	433	467	500	533	567	600	633	667	700	733	767	800	833	867	900	933	A	20
	B	227	260	293	322	353	383	412	443	473	502	533	563	592	623	653	682	713	743	772	803	833	862	B	21
21	A	245	280	315	350	385	420	455	490	525	560	595	630	665	700	735	770	805	840	875	910	945	980	A	21
	B	239	273	306	338	369	401	432	464	495	527	558	590	621	653	684	716	747	779	810	842	873	905	B	22
22	A	257	293	330	367	403	440	477	513	550	587	623	660	697	733	770	807	843	880	917	953	990	1,027	A	22
	B	251	286	320	353	385	419	452	484	518	551	583	617	650	682	716	749	781	815	848	880	914	947	B	23
23	A	268	307	345	383	422	460	498	537	575	613	652	690	728	767	805	843	882	920	958	997	1,035	1,073	A	23
	B	261	299	333	367	402	437	471	506	540	574	609	644	678	713	747	781	816	851	885	920	954	988	B	24
24	A	280	320	360	400	440	480	520	560	600	640	680	720	760	800	840	880	920	960	1,000	1,040	1,080	1,120	A	24
	B	273	311	347	383	419	455	491	527	563	599	635	671	707	743	779	815	851	887	923	959	995	1,031	B	25
25	A	292	333	375	417	458	500	542	583	625	667	708	750	792	833	875	917	958	1,000	1,042	1,083	1,125	1,166	A	25
	B	285	322	360	398	435	473	510	547	585	623	660	698	735	772	810	848	885	923	960	997	1,035	1,072	B	26
26	A	303	347	390	433	477	520	563	607	650	693	737	780	823	867	910	953	997	1,040	1,083	1,127	1,170	1,213	A	26
	B	295	335	374	412	452	491	529	569	608	646	686	725	763	803	842	880	920	959	997	1,037	1,076	1,114	B	27
27	A	315	360	405	450	495	540	585	630	675	720	765	810	855	900	945	990	1,035	1,080	1,125	1,170	1,215	1,260	A	27
	B	306	347	387	428	468	509	549	590	630	671	711	752	792	833	873	914	954	995	1,035	1,076	1,116	1,157	B	28
28	A	327	373	420	467	513	560	607	653	700	747	793	840	887	933	980	1,027	1,073	1,120	1,167	1,213	1,260	1,307	A	28
	B	317	358	401	446	484	527	569	610	653	694	736	779	821	862	905	947	988	1,031	1,073	1,114	1,157	1,199	B	29
29	A	338	387	435	483	532	580	628	677	725	773	821	870	918	967	1,015	1,063	1,112	1,160	1,208	1,257	1,305	1,353	A	29
	B	327	371	414	457	501	545	588	632	675	718	762	806	849	893	936	979	1,023	1,067	1,110	1,154	1,197	1,240	B	30
30	A	350	400	450	500	550	600	650	700	750	800	850	900	950	1,000	1,050	1,100	1,150	1,200	1,250	1,300	1,350	1,400	A	30
	B	338	383	428	473	518	563	608	653	698	743	788	833	878	923	968	1,013	1,058	1,103	1,148	1,193	1,238	1,283	B	31
31	A	362	413	465	517	568	620	672	723	775	827	878	930	982	1,033	1,085	1,137	1,188	1,240	1,292	1,343	1,395	1,446	A	31
	B	348	394	441	488	534	581	627	673	720	767	813	860	906	952	999	1,046	1,092	1,139	1,185	1,231	1,278	1,324	B	32
32	A	373	427	480	533	587	640	693	747	800	853	907	960	1,013	1,067	1,120	1,173	1,227	1,280	1,333	1,387	1,440	1,493	A	32
	B	358	407	455	502	551	599	646	694	743	790	839	887	934	983	1,032	1,082	1,132	1,182	1,232	1,282	1,332	1,382	B	33
33	A	385	440	495	550	605	660	715	770	825	880	935	990	1,045	1,100	1,155	1,210	1,265	1,320	1,375	1,430	1,485	1,540	A	33
	B	369	419	468	518	567	617	666	716	765	815	864	914	963	1,013	1,062	1,112	1,161	1,211	1,260	1,310	1,359	1,409	B	34
34	A	397	453	510	567	623	680	737	793	850	907	963	1,020	1,077	1,133	1,190	1,247	1,303	1,360	1,417	1,474	1,531	1,587	A	34
	B	380	430	482	533	583	635	686	736	788	839	887	941	992	1,042	1,094	1,145	1,195	1,247	1,298	1,349	1,400	1,451	B	35
35	A	408	468	525	583	642	700	758	817	875	933	992	1,050	1,108	1,167	1,225	1,283	1,342	1,400	1,458	1,517	1,575	1,633	A	35
	B	390	444	495	547	600	653	705	758	810	862	915	968	1,020	1,073	1,125	1,177	1,230	1,283	1,335	1,388	1,440	1,493	B	

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THE CIA RETIREMENT AND DISABILITY FUND

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MANUAL  
OF  
RETIREMENT AFFAIRS DIVISION  
INTERNAL PROCEDURES

CURRENT AS OF 5 MARCH 1969

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Retirement Affairs Division  
Internal Procedures

<u>NUMBER</u>	<u>SUBJECT</u>	<u>STATUS</u>
1.	Establishment, Maintenance and Disposition of Retiree Dossiers and Related Records	Published
2.	Policy and Procedures Governing Correspondence with Retirees	Published
3.	Extension of Service Beyond Normal Retirement Date	Published
4.	Public Posting of Position Vacancies for Eligible Retirees	Published
5.	Coordination with the Special Activities Staff (SAS) Prior to the Counseling of Employees	Published
6.	Transmittal of Carbons to the Office of the Director of Personnel	Published
7.	Utilization of the RAD Posting Check Sheet	Published
8.	Preparation and Distribution of Retirement Portfolios	Published
9.	Conduct of Retirement and Financial Planning Seminars	Published
10.	Commendatory Letters	Published
11.	Answering Queries on Present or Former Staff and Contract Employees	Published
12.	Documentation for Post-Retirement Use	Published
13.	Special Interim Annuity Payments	Published

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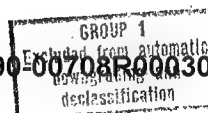
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<u>NUMBER</u>	<u>SUBJECT</u>	<u>STATUS</u>
14.	Management and Functions of Retirement Reading Room	Pending
15.	Job Leads Source Control	Pending
16.	Limitation of Clerical Support to Clients of EEAB	Pending
17.	External Employment Assistance for Resignees	Published
18.	Investigators - Review of Files	Published
19.	Five-Year Consultations	Published
20.	Legal Assistance to Retirees	Published
21.	Referral of Prospective Retirees from RCB to EEAB	Published
22.	Medical Examinations for Retirees	Published

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RAD INTERNAL PROCEDURE  
No. 1

12 September 1968

Establishment, Maintenance and Disposition of  
Retiree Dossiers and Related Records

1. General Policy

The Retirement Affairs Division (RAD) has established a retiree records system which is designed to provide a central point for maintaining data pertinent to each potential retiree. The records system consists of a central file of individual dossiers containing all retirement information, documentation and a record of all actions taken, materials provided and assistance rendered to each retiree from his initial contact with RAD until such time as retirement and/or external employment assistance is no longer required. The records system also includes a WHEELDEX card index to insure proper monitoring of the dossier file, control of dossiers removed from the file for any reason, and a permanent record of pre-retirement counseling and other assistance given each retiree.

2. Categories of Retirees

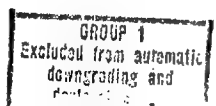
Within the purview of these procedures there are three categories of retirees with whom RAD is concerned. They are:

(a) Programmed - Those individuals listed in machine runs by name, date of birth, career service, retirement system and longevity computation dates from which it is determined that the individual is within the five-year mandatory retirement zone and therefore subject to periodic and scheduled retirement counseling and assistance.

(b) Non-programmed - Walk-in or referral cases who may desire retirement information or counseling concerning retirement eligibility, planning, systems, options, (i.e., early, disability, etc.), external employment, and/or other related considerations. These individuals may not yet have reached the five-year zone of retirement consideration; they may, in some instances, have met the requirements for optional retirement prior to the mandatory retirement date; they may be retiring prior to 1973 and thus have been invited to participate but are not programmed into the system.

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(c) Post-retirement - Those individuals who have retired and whose files remain active because of a possible requirement for external employment assistance or other retirement assistance which it is within the capacity and authority of the RAD to provide. Except in unusual cases where it may be in the Agency's interest to do otherwise, this assistance will be limited to one post-retirement year.

3. Procedures for Establishment and Current Maintenance of Retiree Dossiers

(a) Programmed

(1) On receipt of the IBM card indicating retirement date (normally five years hence) the RAD clerk will initiate a request for a biographic profile from the Qualifications Analysis Branch (QAB). A retiree dossier will be opened in full name with last name first, the biographic profile inserted and the dossier placed in the retiree central file system. A photograph may later be requested from the Office of Security, if desired. Appropriate record of actions taken by RAD will be entered in the WHEELDEX card file.

(2) The dossier will be organized and maintained in accordance with the RAD approved file and tabs, and appropriate records made of queries, contacts and actions taken in connection with the individual.

(3) The Counselor's questionnaire will be filled in with appropriate annotations and checked in accord with the responses of the employee. The questionnaire and the External Employment Assistance Information form which will be filled in by individuals desiring job assistance, will be filed in the retiree's dossier. The dossier will also be color-coded on the top edge to permit quick identification of an individual's field of interest, skills and geographical area of preference, with regard to post-retirement employment.

(4) Upon completion of a retirement interview with a prospective retiree, the Retirement Counselor will record the results of the interview in a Memorandum for the Record and, if appropriate, the RAD clerk will forward a copy to the External Employment Assistance Branch (EEAB) prior to EEAB follow-up action.

(5) When a dossier is removed from the central file for any reason, a charge-out card, initialed by the officer who withdraws it, will be inserted in its place. If the dossier

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is transferred to the EEAB for retention as the primary action office, an entry will be made in the WHEELDEX (in pencil) showing the reference as a charge-out and indicating the date of transfer. Upon completion of the action, the dossier will be returned to the file and the WHEELDEX will be changed to reflect such return.

(b) Non-programmed

(1) Upon any significant non-programmed contact with the Retirement Counseling Branch (RCB) the latter will open a dossier on the individual, procure the biographic profile and handle as in programmed cases, including entry of information in the WHEELDEX. If appropriate, the individual will also be referred to the EEAB, Retirement Operations Branch (ROB) and elsewhere for specialized assistance.

(2) Any walk-in, referral or other non-programmed contact with the EEAB or ROB will be referred to the RCB. Upon counseling, interviewing or other appropriate action, RCB will establish a dossier on the individual to include a report of action taken. Subsequent referral back to EEAB or ROB will be made as necessary with appropriate entry in the WHEELDEX.

(3) Any subsequent handling or processing of non-programmed retiree's dossier will be in accord with the routine established for programmed cases.

4. Post-Retirement Employment Requirements

Upon completion of counseling interviews by RCB, if it appears that an individual has an active and positive interest in external employment and would favorably consider early retirement if suitable work could be found, or, if the individual's retirement is imminent and there is a pressing need for outside employment, the individual's dossier, if not already there, will be sent to EEAB for immediate action and a WHEELDEX entry made accordingly.

5. Disposition of Retiree Dossiers

(a) No later than four months after retirement of the individual, the original signed approved Personal History Summary will be removed from his dossier and forwarded to the Office of Personnel File Room for inclusion in his Official Personnel Folder prior to the Folder being retired to the Records Center; which in practice, takes place approximately six months after the individual has left the Agency. Normally, within one year after date of actual retire-

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ment, RAD will remove from the dossier all other official documents or correspondence of record and forward this material to the Records Center for inclusion in the retiree's Official Personnel Folder. Non-essential materials will be destroyed and appropriate entries accomplished in the WHEELDEX indicator.

(b) The procedures for closing out a dossier described above may be deferred temporarily in a case where EEAB is still actively engaged in providing post-retirement employment assistance to an individual. In such instances, the dossier will remain intact in the RAD record system until such action is completed.

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RAD INTERNAL PROCEDURE

No. 2

16 September 1968

**Policy and Procedures Governing Correspondence with Retirees**

**1. General Policy**

The Retirement Affairs Division (RAD) will routinely initiate follow-up correspondence with each retiree on the sixth-month anniversary of his retirement. In general terms, this correspondence will convey to the retiree the Agency's continuing interest in his well-being, adjustment to retirement, employment situation, and to solicit other information of potential value to the retirement program. Exceptions to this policy will be made in those situations where the Central Cover Staff, Office of Security, the Special Activities Staff/OP, Benefits and Services Division/OP or the parent division of the retiree interpose conditions on the contacting of an individual. Normally, if a retiree fails to respond to the six-month letter, another letter will not be sent.

**2. Procedures**

**a. Preparation and Review of Correspondence Lists**

Each month the Retirement Operations Branch (ROB) will furnish to the External Employment Assistance Branch (EEAB) a list of the names of those employees who retired five months previously. A copy of this list will be forwarded by EEAB to the Central Cover Staff, Office of Security, BSD/OP and to SAS/OP for review and concurrence prior to the preparation of the follow-up letter. Concurrence of the Agency component (i.e., division/staff) to which the retiree formerly was assigned will be obtained by telephone.

**b. Preparation of Follow-up Letters**

The EEAB will prepare the standard follow-up letter for each of the retirees on the approved list. Although a standard format and wording will be used, in each case the letter will be typed as an original. (See Tab A.) Attached will be a standard form for completion by the retiree. (See Tab B.) Letters will be completely



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## c. Retiree Responses

- (1) Responses to the follow-up letters will be received, recorded and tabulated by EEAB, and will then be forwarded to C/RAD for review and a determination as to the need for further action.
- (2) If the C/RAD determines that further action is required, he will:
  - (a) Return to EEAB those responses requiring action related to employment assistance.
  - (b) Designate an RAD officer to undertake any other action required.

## d. Official Replies

- (1) EEAB will prepare replies to those responses requiring action related to employment assistance.
- (2) The designated RAD action officer will assemble whatever information is required and prepare an official reply in final form (less signature) on all other responses requiring action.
- (3) In any instance where the C/RAD or the action officer (EEAB or RAD) detects any element or facet of the case which suggests a potential security problem or concern, a further check will be made with the Office of Security and/or Central Cover Staff, as appropriate, before an official reply is dispatched.
- (4) All replies prepared by RAD will be routed to EEAB for signature and dispatch. An accompanying memorandum should contain sufficient data to permit EEAB to close the case, including identification of the office or individual from whom the substantive information was obtained or to whom referral was made.

25X1A

(5)



Date \_\_\_\_\_

Retiree \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

Dear \_\_\_\_\_:

As your former employer, the organization is sincerely interested in you and trusts you find the transition period a pleasant experience. I am sure you know the whole retirement program is receiving much emphasis by senior officials here.

In order to be of service to you (if needed) and for statistical purposes, we would like for you to complete the attached form. If there are any questions on the form that you feel you should not answer, please complete the remainder and return it as soon as possible.

Thank you very much for your consideration.

Sincerely,

25X1A

\_\_\_\_\_  
Personnel Officer

Attachments:  
Questionnaire  
Envelope

NAME \_\_\_\_\_

CURRENT ADDRESS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

PHONE \_\_\_\_\_

EMPLOYED

YES \_\_\_\_\_

NO \_\_\_\_\_

(If yes)

Employer \_\_\_\_\_

Job Title \_\_\_\_\_

Salary \_\_\_\_\_

Full Time \_\_\_\_\_

Part Time \_\_\_\_\_

INFORMATION DESIRED

SUGGESTIONS

Guide for Corresponding with Retirees

25X1A

25X1A

Date: \_\_\_\_\_  
(Month, Day, Year)

Retiree's Name  
Street Address  
City & State

Dear \_\_\_\_\_,

This letter is in response to your recent correspondence.

(Personalized response to the retiree's specific requests for information or suggestions are to be included here, in this portion of your letter.)

Should you wish or need to contact us in the future, please direct your correspondence to me at the address indicated above.

Yours very truly,

25X1A

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RAD INTERNAL PROCEDURE  
No. 3

25 February 1969

Extension of Service Beyond Normal Retirement Date

1. General Policy

The Retirement Affairs Division (RAD) has been assigned primary responsibility for monitoring the "Extension of Service" program to insure that extension requests are initiated in sufficient time prior to scheduled date of retirement to permit orderly review and processing through the appropriate command channels. All provisions herein apply to participants in both the Civil Service and CIA Retirement Systems.

2. Procedures

a. An officer in the Retirement Counseling Branch (RCB), designated by the C/RAD, will, in October of each year, verify with each Career Service the monthly groupings of those scheduled to retire during the year commencing the second January following; or, one year and three months prior to the earliest possible retiree for the calendar year. The Career Service will determine, through consultations with each individual, whether he intends, or is considering submitting a request for an extension.

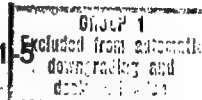
b. By the end of each month the RCB Counselor will check with the Career Service of the component he represents, the names from the master monitor (yearly list) of those employees who, during the current month reached their twelfth month prior to retirement, as projected during the annual October review, to determine whether there has been any change in status.

c. Corrections, adjustments and deletions to the monthly list will be made jointly by the RCB and the Career Service.

d. The RCB will coordinate the corrected monthly list with the Executive Secretary, CIA Retirement Board, Retirement Operations Branch (ROB), to insure that the records he monitors for the Board are current and accurate.

e. Each extension case, determined or potential, which evolves from the foregoing procedures will be included in the monitoring index of the Secretary, CIA Retirement Board. A soft file will be set up by the Secretary for each extension case for reference purposes for future action. The RCB will make appropriate entries in the individual's dossier and in the WHEELDEX index.

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f. Upon receipt of an extension request, the Secretary will prepare a fact sheet which will include all pertinent details of the case; e.g., compassionate considerations, Agency requirements, etc. This, together with all memoranda on the case, including the biographic profile, will be reproduced in sufficient copies for inclusion in the books sent to each member of the CIA Retirement Board prior to its bi-weekly meetings. The case will then be put on the agenda for action at the next Board meeting but in no instance later than the end of the eleventh month prior to the employee's retirement month.

g. After consideration by the Board, a memorandum to the Director of Central Intelligence will be prepared by the Secretary of the Board for signature by the Director of Personnel, stipulating the details of the case, recommendations of the Career Service and Deputy Director (or Head of Independent Office), and Director of Personnel comment on the Board recommendations. Such action will be completed and the case forwarded to the DCI by the end of the tenth month prior to the employee's retirement month.

h. Upon receipt of the Director's decision a memorandum will be prepared by the Secretary of the Board for signature by the Director of Personnel, informing the employee of the decision and forwarded to him through the appropriate Deputy Director or Head of Independent Office and Career Service. A copy of this memorandum will be placed in the employee's dossier and appropriate entry made in the WHEELDEX index.

i. A suspense file will also be established within RAD. If the Director of Personnel's memorandum transmitting the Director's approval or disapproval of the extension request includes a recommendation that the employee seek the assistance of RAD in obtaining external employment the employee's name will be entered in the suspense file. Thirty days from the date of the memorandum, if the employee has not sought such assistance, the appropriate RAD Counselor will so inform the Career Board concerned and request that the individual be advised to avail himself of the services provided by RAD. A record of such advisories will be maintained in the employee's dossier and in the WHEELDEX index.

j. If the employee responds to the Career Board's advisory, the External Employment Assistance Branch, RAD, will make available to the employee any appropriate available job leads and will endeavor to develop new leads suitable to the employee's requirements. In addition, the employee will be requested to visit the United States Employment Service and avail himself of its assistance in finding a position. The employee will also be asked to report back to EEAB the results of his discussions with USES, including job leads furnished, follow-up action taken or proposed, and reasons for rejection of job leads if such is the case. A summary of this (these) report(s) will be included in the employee's dossier.

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3. Retirement Counseling

When in the course of regular retirement counseling, at any time between the five-year interview and the employee's actual retirement, the RCB is given any indication that an employee has a problem calling for compassionate consideration which might lead to a request for extension, such information will immediately be conveyed to the appropriate Career Service for further examination and command action.

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25X1A  
c. The listing will advise prospective retirees to contact EEAB [REDACTED] for further information. EEAB will verify that the applicant is, in fact, eligible for retirement before any further action is undertaken or information released. This can be done by phone call to the Position Inventory Branch, Office of Personnel, for verification of birth date and service computation date, or by reviewing the biographic profile on file in the Qualifications Analysis Branch, Office of Personnel.

d. Having established that the applicant is, in fact, eligible or within 90 days of eligibility (18 months for academic positions), the EEAB counselor will set up a personal interview with the applicant at which time he will assess his qualifications and suitability prior to referral to the prospective employer.

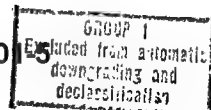
e. The RAD will not advise the employee's Career Board or supervisors of his interest until the applicant indicates he intends to actively pursue the lead.

f. Referrals to prospective employers will be made with the understanding that the applicant will advise EEAB of the outcome of each such interview.

Attachment:

Sample Listing

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POSITION VACANCIES

FOR ELIGIBLE RETIREES ONLY

The position vacancies listed below are currently on file in the External Employment Assistance Branch, Retirement Affairs Division, Office of Personnel. Further information pertaining to these positions will be made available only to employees who are currently eligible for optional retirement or those who are within 90 days of attaining eligibility (18 months for academic positions). Call extension [REDACTED]

25X1A

#101

LOCATION (City/State)

POSITION/DUTIES (Description)

QUALIFICATIONS (Desired/Mandatory)

SALARY (Specific/Open)

STARTING DATE (Month/Year)

#102

ETC.

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RAD INTERNAL PROCEDURE  
No. 5

28 February 1969

Coordination with the Special Activities Staff  
(SAS) Prior to Counseling of Employees

1. General Policy

Prior to counseling employees on retirement matters, whether scheduled or walk-ins, all names will be checked with the Special Activities Staff (SAS), Office of Personnel, [REDACTED] to ascertain whether that office has any interest in the individual concerned. If there is, in fact, SAS interest, the latter office will provide guidance with regard to what follow-up, referrals or discouragement of further contact should be made.

25X1A

2. Procedures

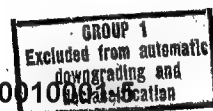
a. To implement the above policy, the Retirement Affairs Division (RAD), by 31 January of each year, will prepare an alphabetical listing of all Agency employees scheduled for mandatory retirement (under either the CSRS or CIAR&DS) five years hence. The list will be forwarded in duplicate to SAS for review. The original will be returned to RAD with the following indicators assigned as applicable:

- (1) "x" Those with whom we should have no contact;
- (2) "y" Those who may be given limited assistance such as attending seminars and to whom we may give material but with whom there will be no detailed personal consultations;
- (3) "z" Those who may be given complete counseling and assistance but whose cases should be given discreet handling.

b. If, subsequently, SAS interest should develop with regard to additional employees on the list, RAD will be so advised by SAS and a notation ("x", "y", or "z") will be entered on the WHEELDEX index.

c. In those instances where an individual walks in to RAD seeking advice or assistance and where there has been no prior check by RAD, the counselor will have a secretary make a phone check with SAS before he engages in any substantive discussion with the individual. If the SAS check is affirmative, the interview will be smoothly terminated as soon as possible and SAS informed of its tenor and results. A memorandum for the record will also be made for the immediate attention of the Chief, RAD, copy to SAS.

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RAD INTERNAL PROCEDURE  
No. 6

27 February 1969

Transmittal of Carbons to the  
Office of the Director of Personnel

1. General Policy

To insure that the Office of the Director of Personnel is kept informed of RAD activities, carbon copies of RAD Memoranda for the Record concerning planned and unusual activities involving RAD personnel will be forwarded to the O/D/Pers for inclusion in the reading file.

2. Procedures

- a. The carbon copy of any document being transmitted outside of the Agency will be forwarded to the Office of the Director of Personnel at the time of the dispatching of the original.
- b. Carbons of notated routing sheets or covering memoranda for memoranda, lists, retirement documents, etc. transmitted by RAD to other offices of the Agency, including other elements of the Office of Personnel, will be forwarded within the week in which the materials are sent out.
- c. Internal RAD memoranda will be transmitted to the Office of the Director of Personnel within a week of the date on which they were typed.

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RAD INTERNAL PROCEDURE  
No. 4

7 October 1968

**Public Posting of Position Vacancies  
for Eligible Retirees**

**1. General Policy**

The External Employment Assistance Branch (EEAB) of the Retirement Affairs Division (RAD) will make the necessary arrangements to have posted, periodically, on bulletin boards situated in the principal Headquarters buildings, a listing of currently available position vacancies which may be of interest to Agency employees who have qualified, or who are about to qualify, for optional retirement. Each listing will contain pertinent information concerning the position vacancy, however, the identity of the employer will be obtainable only through the EEAB which will first establish the eligibility and qualifications of an applicant.

**2. Eligibility**

The posting of position vacancies is an undertaking of the RAD which is designed to assist employees qualified, or near qualified for optional retirement, who need or desire post-retirement employment. It is not intended, nor will it be permitted, that this facility be a convenience for resignees or other separatees from the Agency. Its sole purpose is to provide assistance to qualified retirees and each posted listing will be prefaced by an explanatory statement to this effect.

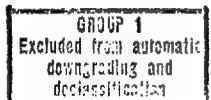
**3. Procedures**

a. EEAB will make the necessary arrangements with the appropriate building authorities to have posted bi-weekly on selected bulletin boards in the principal Agency Headquarters buildings, a list of currently available position vacancies for the consideration of prospective retirees. The buildings referred to will include, but not necessarily be limited to, Headquarters, Ames, Key, Magazine, NPIC and Glebe.

b. The listings will include a prefatory statement defining eligibility criteria. Substantive information will include such items as city and state, job title and description, salary, and qualifications required or desired, if available. The name of the company or its specific street address or telephone number will not be listed.

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RAD INTERNAL PROCEDURE  
No. 7

3 March 1969

Utilization of the RAD Posting Check Sheet

1. General Policy

The RAD Posting Check Sheet will be used by all counselors in the Retirement Counseling Branch and the External Employment Assistance Branch, to insure that appropriate records are available and current on all employees seeking assistance from the RAD.

2. Procedures

a. During the initial interview the counselor will complete all items in the first two lines. The Service Computation Date (SCD) will be entered directly from either the bio-profile or the official personnel folder. Incidental information related to the desires of the employee, RCB or EEAB proposals, coordination obtained, etc., will be recorded under comments.

b. Counselors will complete those portions of parts Two and Three of the posting check sheet as appropriate.

c. EEAB counselors will pass the marked check sheet to the senior clerical assistant of EEAB who will transcribe the pertinent information to the Form 1711 and forward the check sheet to the first secretary in the office of the C/RAD.

d. RCB counselors will pass marked check sheets to the first secretary C/RAD.

e. The first secretary, C/RAD will transcribe appropriate information on the check sheet to the WHEELDEX index.

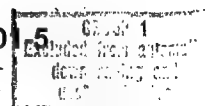
f. Check sheets received from EEAB will be returned to the senior clerical assistant, EEAB for file and subsequent use in preparing the monthly report. RCB check sheets will be destroyed.

3. Follow-up Action

Each time a follow-up contact is made with the employee or a counselor takes action on behalf of the employee, a new Posting Check Sheet will be accomplished. These subsequent check sheets need be filled in only with the name and date of birth in the heading section and such entries as are appropriate to the current action. The check sheets will then be processed in the manner set forth above.

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RAD INTERNAL PROCEDURE  
No. 8

13 March 1969

Preparation and Distribution  
of Retirement Portfolios

1. General Policy

Prior to the annual Retirement Seminar, the Retirement Affairs Division (RAD) will assemble and forward to each invitee, through his career service, a portfolio of retirement materials, associated literature and aids containing up-to-date and practical information on all aspects of retirement planning and preparation.

2. Procedures

a. Research and Review

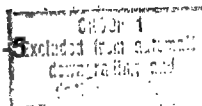
This involves a thorough study of the materials available on all phases and aspects of retirement, both in private industry and the Federal government. Much of this material is free, and an attempt should always be made to use as much as possible of gratis pamphlets and brochures, if appropriate for RAD use. A continuous review is necessary since some of the material becomes obsolete in a matter of months, e.g., Social Security and Civil Service Benefits. Good sources of current information on retirement are insurance companies, retirement organizations, investment houses and the Government Printing Office. The Social Security Administration, Health, Education and Welfare Administration, as well as literature distributed by the various Federal agencies in support of their retirement programs, are also excellent sources of information.

b. Procurement of Material

Once a decision has been reached to use a piece of retirement literature, whether in the portfolio, or as a handout at a seminar, or as a handout by the counselors, the Registrar and Media Officer [REDACTED] will prepare and monitor the requisition and control subsequent handling of the materials. The R&M Officer has developed extensive contacts in private industry and in Federal government with a resultant savings in money and procurement time. The number of copies of material will depend on the cost and the nature of the publication. For example, a pamphlet likely to become outdated in a short period of time will be purchased in smaller quantities than a pamphlet on housing which would not likely be subject to change. Material going into a retirement portfolio for seminar use will be procured and on hand at least 45 days prior to the conduct of the seminar.

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c. Procurement of Vinyl Portfolios

Each person retiring from the Agency will be furnished retirement material in a vinyl portfolio. The portfolios cost the Agency \$3.25 each and the Office of Logistics maintains a supply of portfolios for use by the Office of Personnel. A requisition will be made to the Office of Logistics for these portfolios and at that time the Office of Personnel will be charged for the cost. The vinyl portfolios will be procured and on hand at least 45 days prior to the running of the seminar. The Director of Personnel has approved this expenditure and the issuance of one portfolio to each employee prior to his attending the Retirement Information Seminar.

d. Collation of Material for Placing in Portfolio

The retirement material for inclusion in the vinyl portfolios will be collated and inserted into separate kits (envelopes). The vinyl portfolios that were distributed to retirees attending the November 1968 Retirement Information Seminar contained eight kits of categorical materials consisting of 41 pieces of literature. Attached is a listing of the various publications that were used in the kits. In the past the material has been collated in Magazine Building under the supervision of the R&M Officer, assisted by a temporary detail of three or four employees from the IAS pool. It generally takes about two days to prepare 400 portfolios.

e. Distribution of Portfolios

Portfolios distributed to retirees will be forwarded via the individual's career service. This is necessary for control purposes and to keep the career service apprised of the situation. The portfolios containing the retirement material will be distributed to the retirees no later than 20 days prior to the conduct of the Retirement Information Seminar.

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## KIT # 1 - HEALTH

How To Keep Fit and Enjoy It  
A List of Health Information -- Leaflets and Pamphlets of the PHS  
Facts About Nutrition  
The Fitness Challenge  
Drug Service Price List  
Mental Health in Retirement

## KIT # 2 - SECOND CAREER

Starting and Managing A Small Business of Your Own  
What Your Employment Service Is Doing About Older Workers  
Do's and Don'ts for Mature Job Seekers  
How to Get and Hold the Right Job  
Employment Agencies That Will Bilk You

## KIT # 3 - SOCIAL SECURITY

Your New Social Security and Medicare Fact Sheet  
Your Social Security  
Request for Statement of Earnings  
Your Medicare Handbook -- Health Insurance Under Social Security  
Social Security Benefits -- How You Earn Them

## KIT # 4 - PLAN YOUR RETIREMENT

Time in Your Hands  
Ten Commandments of Creative Retirement  
Are You Planning on Living . . . The Rest of Your Life?  
Meeting the Challenge of the Later Years  
Once in a Lifetime

## KIT # 5 - ORGANIZATION AND CIVIL SERVICE BENEFITS

Your Retirement System (CSC) - Pamphlet 18  
Federal Employee Facts  
Annuity Benefits Under CS Retirement Act  
Key to Annuity Rates  
The Central Intelligence Agency Retirement Act of 1964 for Certain Employees  
Retirement Annuity Monthly Rates  
Public Law 90-539, 80th Congress, H.R. 18786, September 30, 1968  
(Amendment to CIA Retirement and Disability Act.)

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KIT # 6 - LEGAL AND TAX ASPECTS

Do You Need A Will?  
You, the Law and Retirement  
USAF JAG Law Review  
Record of My Important Papers  
Checklist for Legal Check-Up  
Tax Benefits for Older Americans  
Consumer Guide for Older People

KIT # 7 - RETIREMENT AREAS

Tax Facts for Older Americans  
Comparison of Retirement Areas  
Index of Comparative Living Costs Based on the Retired Couple's Budget

KIT # 8 - FINANCIAL PLANNING

Harvest Years Guide to Financial Planning  
What Everybody Ought to Know About This Stock and Bond Business

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RAD INTERNAL PROCEDURE  
No. 9

4 March 1969

Conduct of Retirement and Financial  
Planning Seminars

1. General Policy

The Retirement Affairs Division (RAD) will plan, prepare and conduct a retirement seminar in February of each year, and a financial and estate planning seminar in the fall of each year. The retirement seminar will be presented specifically for those who have received five-year letters the preceding January and invitations will be sent to this group. Others who might wish to attend will be notified by Employee Bulletin and will be accommodated on a first-come, first-served basis. Spouses will be invited to attend whenever accommodations permit. In addition, special seminars on selected subjects of broad general interest (e.g., education, selling, etc.) will be conducted aperiodically as deemed appropriate.

2. Procedures

The following constitute the basic procedures for the planning, preparation and conduct of retirement and financial planning seminars:

a. Prepare "proposed seminar agenda" with speakers and dates. Submit to Chief, RAD who will get D/Pers approval and authorization to pay honorariums and confirmation that funds are available.  
(90 days prior to running of seminar)

b. Reserve Auditorium. Call [REDACTED]  
(80 days)

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c. Contact speakers. Confirm dates and times.  
(80 days)

d. Confirm Security approvals for all speakers.  
(80 days)

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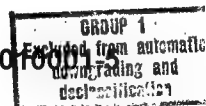
e. Complete final orders for portfolio material.  
(80 days)

f. Requisition portfolios from Logistics.  
(60 days)

g. Ask speakers about special arrangements for podium - i.e., slides, blackboards, etc. Advise [REDACTED]  
(60 days)

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h. Collate material and insert in portfolios.  
(35 days)

i. Arrange for a chartered bus to take Rosslyn employees to Headquarters through a memorandum to Chief, Logistics Services Division.  
(30 days)

j. Prepare Agency Bulletin announcing seminar. Draft to C/RAD who will coordinate with D/Pers.  
(30 days)

k. Draft invitation for selected employees to attend seminars. Draft to be approved by C/RAD and shown to D/Pers.  
(30 days)

l. Get machine listing by name and office number of employees selected to receive seminar invitations.  
(20 days)

m. Send invitations and portfolios to individual employees through respective Career Services. Covering memorandum should be over signature of C/RAD.  
(20 days)

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n. Arrange visitor parking in front of Headquarters Building.  
Call [REDACTED] on Ext [REDACTED]  
(20 days)

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o. Arrange for guards at Auditorium during seminars and reserve two spaces by guard station for those who will transport speakers.  
Call [REDACTED] Ext [REDACTED]  
(20 days)

25X1A  
p. If film showing is to be scheduled, call [REDACTED] CRS/DDI, on [REDACTED] and have her deliver to [REDACTED] on scheduled date.  
(20 days)

q. Draw Request for Advance to get money for honorariums. Submit request to Office of Finance in Key Building. Request receipt form.  
(15 days)

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r. Arrange lunches for speakers. Reserve table in Executive Dining Room. Call [REDACTED]  
(10 days)

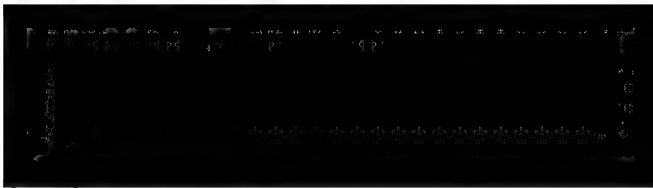
s. Check material for handouts. Request girls to help in Auditorium.  
(10 days)

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- t. Call Personnel Officers and advise of bus schedule and purpose.

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(10 days)

- u. Arrange transportation for speakers. Use office staff.  
(5 days)

- v. Arrange for office colleague to monitor bus departure at  
Magazine.  
(5 days)

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RAD INTERNAL PROCEDURE  
No. 10

4 March 1969

Commendatory Letters for Retirees

1. General Policy

The furnishing of letters of recommendation to retirees is contrary to Agency policy. In lieu thereof, should a retiree so desire, he will be provided a letter of commendation signed by the Director of Personnel. Such letter normally will not be considered warranted if the retiree is already in receipt of a comparable letter of commendation or appreciation from his Deputy Director or Career Service.

2. Procedures

a. In a case where an individual, on leaving the Agency, requests a letter of recommendation, the RAD Counselor or other officer receiving the request, will propose that a commendatory letter of appreciation be prepared by EEAB for the specific services rendered, for the signature of the Director of Personnel. This document, phrased in context and style appropriate to the DOP, should be equivalent to a letter of recommendation. (Sample letters are available in EEAB.)

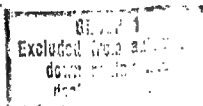
b. Letters of appreciation will not be prepared routinely for all retirees.

c. Letters of appreciation may be written, when appropriate, for either a retiree or resignee.

d. Prior to the drafting of any letter of appreciation, there will be a review of the official personnel folder to ascertain that such a letter is not contrary in any way to the documents contained in the official file reflecting upon the individual's services and the evaluations of his supervisors. In addition, the name of such individual will be checked in advance of preparation of such a letter with the Special Activities Staff (SAS) and the Office of Security.

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Answering of Written Inquiries  
on Present or Former Employees

1. General Policy

The External Employment Assistance Branch (EEAB) will answer inquiries from private industry and Government agencies for employment information on employees who are receiving or who formerly received assistance from EEAB, or who are certain Special Activities Staff (SAS) cases or non-routine cases referred by Transactions and Records Branch.

2. Procedures

a. Staff Employees

(1) Upon receipt of the inquiry and the file, if the file indicates



(2) If there is an SAS memorandum in the file, a thermofax copy of the inquiry will be filled in with suggested answers and sent to SAS for their approval, correction or additions. When approved copy is returned, EEAB will transfer information to original inquiry and send it out to the requesting agency or company.

(3) When there is no SAS memorandum, the file will be reviewed to ascertain if the answer can be prepared from information contained therein. If not, the supervisor will be called or, in his absence, the appropriate personnel officer. On some inquiries, the information may be obtained by phone. On the longer and more inclusive ones, a thermofax copy will be sent to the supervisor or personnel officer for completion and return to EEAB. The information will then be transferred to the original and sent out. Whenever EEAB has actually assisted an employee, an extra copy of the reply will be made and filed with EEAB's file on the employee.

b. Contract Employees

(1) The above procedure for staff employees will be followed generally for contract employees. However, as it is the responsibility of EEAB to obtain the Contract File, and the Contract Personnel Division

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does not have a complete cross-reference of pseudos and true names, it is a more time-consuming process.



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RAD INTERNAL PROCEDURE  
No. 12

4 March 1969

Documentation for Post-Retirement Use

1. General Policy

It is Agency policy to assist employees in their attempts to obtain employment outside the Agency. Pursuant to this line of direction, RAD is the organization component designated to assist in the preparation of the necessary documentation.

The purpose of this paper is to describe procedures governing the preparation and approval of items of documentation needed in external job search efforts. The phrase "items of documentation" applies to the "Personal History Summary," the "Resume" and the "Summary of Agency Employment."

2. Procedures

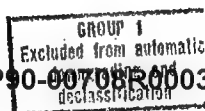
a. An employee who desires assistance in obtaining external employment will be interviewed by a counselor in the External Employment Assistance Branch.

b. The counselor will determine whether or not the employee has had a statement of his Agency experience approved for use in external job search. If not, the employee will be instructed to prepare a summary of his Agency employment. The counselor may assist the employee in the preparation of the statement.

c. When the employee completes what he believes to be a comprehensive and an accurate non-sensitive statement of his Agency work experience, the counselor will route the document to Central Cover Staff and to the Office of Security for review and approval. In the process of such review, the employee may be invited to either CCS or OS, or both, to effect changes necessitated by considerations of cover and security.

d. Having been approved by Cover and Security, a document will be returned to the counselor in EEAB who will advise the employee that he may use the approved summary when describing his Agency work experience after separation from the Agency. An employee may prepare a Personal

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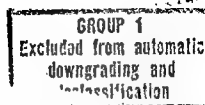
History Summary in which he will relate all the significant factors in his total background, including Agency experience delineated as in his approved Summary of Agency Employment.

e. The counselor will next guide the employee in preparing a resume to be used in applying for a particular job in which he is interested. A resume will be a statement of all the significant factors from the employee's total background of experiences (Agency and other) which are selected to "target in" on a specific job or position of interest. Some employees may prefer to use the PHS instead of the resume in the job search.

3. Other

Until such time as the process for preparation and approval of the Summary of Agency Employment is established by Headquarters and appropriate published field notices, EEAB will be the general focal point for guidance and assistance on this subject. When, as is anticipated, the preparation of SAE's is decentralized among the various operational components, EEAB will concern itself primarily with the preparation of PHS's and resumes. Until that time, EEAB will assist on all three documents.

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RAD INTERNAL PROCEDURE  
No. 13

27 March 1969

### Special Interim Annuity Payments

#### 1. General Policy

It is the policy of this Agency to provide a special interim annuity check(s) to any CIAR&D System retiree pending the final verification of complete entitlements for the employee's annuity and transfer of funds back from the Civil Service Commission, when the verified total amount cannot be provided on schedule.

#### 2. Procedures

a. Retirement Operations Branch will determine through the processing of appropriate documents for an individual that the complete annuity calculations and follow-up payment are likely to be delayed.

b. On determination of a probable excessive delay beyond one month, ROB will so notify the Office of Finance.

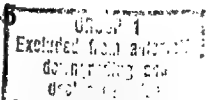
c. ROB will transmit to the Office of Finance a statement of CIA service and the average High-five salary.

d. The Office of Finance will cut an interim check, not to exceed 75 percent of the estimated basic annuity, based upon the above two facts and transmit the check to the employee on the normal scheduled mailing date, in accordance with paragraph b. above. Periodic interim checks will be mailed on the regular schedule until statement of verification has been received by the Office of Finance.

e. Whenever an interim check has been issued by the Office of Finance, the Office of Finance will, upon receipt of the statement of verified service and related information from ROB, cut a special check to cover the amount of the difference between a payment(s) already made and the amount of the regular annuity check.

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RAD Internal Procedure  
No. 17

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19 May 1969

**External Employment Assistance  
for Resignees**

**1. General Policy**

In addition to furnishing assistance to retirees, the External Employment Assistance Branch (EEAB) will furnish guidance to employees resigning from the Agency in the preparation of documentation to be used in applying for employment outside the Agency.

**2. Procedures**

a. An employee requesting EEAB to provide him with assistance will be advised that the service is available to him only with the knowledge of his component personnel officer and, if he has had cover, only after approval by the Cover Staff. A check will also be made with the Special Activities Staff (SAS) to determine whether that office has any interest in the individual. On referrals from SAS to EEAB for employment assistance, an employee who has had cover will be advised to contact the Cover Staff for instructions.

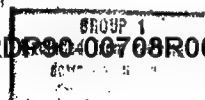
b. When the above procedures are complied with, the file will be ordered and reviewed.

**(1) Assistance in Obtaining Government Employment**

- (a) When the employee is interested in Government employment, a check will be made to determine whether he has Civil Service status. If he does not, his background will be reviewed to ascertain the appropriate Civil Service tests which he might take to establish such status. When this preliminary review is completed, an appointment will be arranged for an interview.
- (b) Assistance will be given in the preparation of a Form 171 (Government application form) and arrangements will be made for necessary clearances of the form with Security and Cover, when applicable.
- (c) If an employee has status, copies of Civil Service documentation reflecting this fact will be made for his use. If he is currently a professional and had obtained status as a non-professional, he will be advised to file for any CSC examination for which he is qualified to establish

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professional status. This may not be necessary but it is a precautionary measure inasmuch as some Government agencies require such certification from the Civil Service Commission. He will be further advised that, unlike the non-status person filing for such an examination, he can be hired immediately by an interested Agency and will not have to wait for his name to appear in order on the Register.

- (d) Upon receipt of the approved Form 171, an employee having status will be advised of any existing vacancies in the competitive agencies and, where advisable, appointments will be made for him. Where not advisable, he will be furnished a list of suggestions which will include actual vacancies. The same referral procedure applies to the few Excepted Agencies (NSA, FBI, DIA, AEC) which, like CIA, are excepted from the hiring procedures of the Civil Service Commission.
- (e) For those employees not having status, the appropriate Civil Service examinations will be reviewed with them and instructions will be furnished on the method of filing for the examinations in order to establish status. If the employee expects to be with the Agency when the ratings are received, he will be advised to notify EEAB upon receipt, and information on current vacancies and other suggestions will then be furnished to him. If the employee expects to leave before receipt of the rating, he will be given general information on government agencies which might utilize his background.
- (f) Both status and non-status personnel leaving the area will be given lists of Government agencies in their prospective areas. The non-status employees who have taken a test in Washington will be advised of the procedure for transferring their eligibility to the new location.

(2) Assistance in Applying for Employment in Private Industry

- (a) Assistance will be given in filling out a Personal History Summary and arrangements will be made for necessary clearances. The employee will be advised to file with the United States Employment Service and, in addition, he will be given access to material in EEAB which lists firms in the new location.

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(3) Assistance in Applying for Other Government Employment

This group of employees is treated separately herein because they are referred by SAS and usually have only two weeks in which to obtain employment. Time is of the essence, therefore, if they are to have a new position available upon termination of Agency employment.

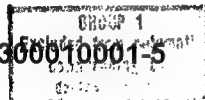
- (a) A secretary/stenographer/clerk typist test is conducted every day at the Civil Service Commission. The rating may be picked up late the same day the test is given, or be mailed out that evening. Because of the shortage of this category of personnel in Washington, D. C., if a candidate passes the test with a percentage rating over 70 percent she is eligible for selection from the Register. If the employee passes the test the first time, there is usually no problem in obtaining a position within the two-week period. Where the circumstances of the case allow, appointments will be made for interviews. Otherwise a few Government leads are furnished to the individual, and she will be responsible for making the appointments. In both cases, however, there is an exchange of phone calls among the new employing agency, EEAB and the employee, which includes forwarding the necessary personnel data to the new Agency.
- (b) For clericals with no typing or shorthand, a vacancy will be sought in an excepted agency, and, in addition, information will be furnished on the Junior Federal Assistant Examination, or other open examinations not requiring typing or shorthand skills. Examinations for other than the secretary/steno/typist are given on an appointment basis, and the rating is not received for at least one or two months after the test, thereby precluding any possibility of immediate placement. For clericals, therefore, it will usually be necessary for EEAB to provide assistance in obtaining employment in private industry.

(4) Assistance in Applying for Employment in Private Industry--  
Pool Disqualifications

Few of the persons disqualified from the pool (Interim Assignment Section) will require a Personal History Summary. They will be given guidance in filling out employment applications and will be given the name of

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an EEAB counselor for reference purposes. The same procedures described in paragraph 2 b. (2) (a) above will be followed, but due to the youth and inexperience of the individuals needing assistance, more concentrated guidance will be necessary.

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RAD INTERNAL PROCEDURE  
No. 18

24 March 1969

Investigators -  
Review of Files - References

1. General Policy

The External Employment Assistance Branch (EEAB) will function as a liaison between government investigators and Agency employees.

2. Procedures

a. When an investigator calls in to EEAB seeking information on an employee, he will be asked whether he wishes that information be furnished only from the personnel file or if, in addition, he desires an interview with a supervisor and co-worker.

b. The personnel file will be ordered from Employee Files.

c. If, when the file is received, it contains a memo from the Special Activities Staff (SAS), a consultation will be held with that office before any further steps are taken. Also, if the file does not indicate that cover held by the employee has been lifted, this will be checked out with CCS. Instructions received in each of these instances will be followed.

d. The normal procedure, unless exceptions have been specified by SAS or Cover, will be to review the file and type required information on a card which will be permanently retained by EEAB.

e. To comply with the request for an interview with a supervisor, who in turn will furnish the name of the co-worker, the supervisor listed on the most recent Fitness Report will be called. He will be advised that EEAB acts as a liaison between government investigators and our employees. He will then be asked permission to furnish his name and telephone extension to the investigator. Depending upon circumstances, this may result in the substitution of someone else who has known the employee in a supervisory capacity. In some cases, there will be no one available. This could be (1) because of the length of time that has elapsed since the person was employed by the Agency; (2) the transitory nature of some of our employees or (3) cover or security reasons. In such cases, the investigator is advised that "no one is available." An effort will be made to hold this type response to a minimum due to the fact that the Agency wishes to cooperate with the investigative services whose cooperation, in turn, our security investigators need to perform their duties.

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f. Many of the files reviewed for the FBI are labeled "White House Priority" as they are for present employees being detailed to the White House or former employees either working or being considered for White House appointments. When files are reviewed for the FBI, it will be necessary to attempt to contact a supervisor for each different assignment that the employee or former employee has held. The time and effort consumed in this operation will depend upon the number of years worked and the number of assignments held.

g. During the EEAB interview, the investigator will not be shown the file, but his questions will be answered by the EEAB counselor. Most of these can be anticipated and can be responded to from information contained in the EEAB file card referred to in paragraph d. above. Names and phone numbers of supervisors will be furnished to the investigator and he can make his appointments at their convenience.

### 3. Interviews with CIA Personnel Given As References

a. Investigators frequently call in with the name of a CIA employee who has been listed as a reference by a friend or acquaintance.

b. The EEAB counselor will obtain the phone number, call the individual, explaining that EEAB acts as a liaison between government investigators and our employees, and advise him of the name of the person who has listed him as a reference, asking his permission to furnish his phone number. (This procedure is followed because of the many complaints received from Agency employees, who were disconcerted and sometimes upset to have an individual from the "outside" call them directly for an interview in the Agency.)

c. When clearance has been obtained to furnish the phone number, it will be given to the investigator who will then set up his interview. If a problem should arise involving considerations of security or cover, the individual should consult with his Cover or Security office. Instructions by the latter will be followed by the EEAB.

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RAD INTERNAL PROCEDURE  
No. 14

4 March 1969

### Five-Year Consultations

#### 1. General Policy

The Agency Retirement Program is primarily organized into a five-year plan for seminars and individual counseling. It is essential that all employees anticipating retirement be provided timely guidance and assistance on their retirement problems. Re-training for certain types of occupations, acquiring essential documentation covering the employee and his dependents, preparing for financial augmentation of his retirement annuity and most important for development of a sound psychological approach to retirement, all require a rather lengthy preparatory period. It is therefore the policy to provide personal consultations which will commence no later than five years prior to separation.

#### 2. Procedures

a. The Retirement Counseling Branch control and statistics officer will annually verify, with the Executive Secretary of the CIA Retirement Board, the list of employees scheduled for retirement five years hence. Following verification he will recast this list according to career service and provide the pertinent career service list to the appropriate directorate counselor.

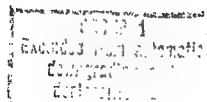
b. The five-year letter sent to every employee by the Director of Personnel five years prior to the year in which he becomes 60 years of age will carry a paragraph putting the employee on notice that his retirement counselor will be in touch with him in the near future to schedule the employee's first consultation.

c. The directorate counselor will request copies of the bio-profiles for his career service(s). These requests will be submitted in monthly groups.

d. On receipt of the bio-profiles, the Retirement Counseling Branch secretary will establish the retirement dossier for each employee, place the bio-profile, IBM list-out card (if available), and a copy of the five-year letter and its transmittal record sheet in the dossier. She will place the name label on the dossier and stamp the folder SECRET. The secretary to the C/RAD will post the established dossier on a WHEELDEX record card including pertinent control data and then file the dossier alphabetically.

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e. The responsible retirement counselor will withdraw a dossier and contact the related employee to make an appointment for holding the five-year consultation. This will normally be during his birth month five years prior to reaching age 60.

f. If the employee is not available at Headquarters for consultation in the scheduled month, or a contact cannot be projected to complete the five-year consultation during the year, the retirement counselor will contact the career service and any pertinent administrative components to establish a referral control in the employee's soft file for arranging consultation on his return to the Headquarters area.

g. If an employee or his career service indicates a plan for early retirement, as soon as this plan becomes known and no later than five years prior to planned retirement, the five-year consultation will be scheduled in collaboration with the career service and the employee, if available.

h. The retirement counselor will make a complete review of his plans for retirement. This review will be governed primarily by the retirement questionnaire which is the counselor's guide for surfacing the important areas for retirement consideration and for identifying the individual's problems in relation thereto.

i. The counselor will discuss as fully as possible each item of interest to the retiree or surface each as a potential area of interest.

j. The retirement counselor will provide related leaflets, pamphlets and published information which may be available to augment his guidance of the retiree. The retirement counselor will inquire as to the employee's intention relative to employment after separation from the Agency. If the employee indicates an interest in possible employment, the retirement counselor will ask him to complete the External Employment Assistance Information sheet and return it either to the retirement counselor or to the EEAB officer at the time of his first consultation in EEAB.

k. The employee will be informed by the retirement counselor that no job lead assistance can be given until the EEAI has been completed and related information provided EEAB.

l. Where an interest in post-Agency employment is indicated, the retirement counselor will contact EEAB to arrange for an appointment for an officer of that branch to interview the employee.

m. Every five-year consultation or other initial consultation will be cleared in advance with the appropriate career service in order to surface any complications or special handling which may be required.

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n. Every initial consultation -- five-year or otherwise -- will be checked with SAS prior to the consultation. The retirement counselor will file in the dossier the questionnaire with any notations deemed advisable.

o. The retirement counselor will prepare a memorandum for the record of every five-year consultation or other initial consultation including all appropriate items in the discussion which may be of assistance to the employee as he prepares for retirement. This memorandum for the record will include under the subject or in the initial paragraph a reference as to the result of the SAS check. This memorandum for the record will be prepared in an original, subject's file copy, D/Pers reading file and chrono copy.

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RAD INTERNAL PROCEDURE  
No. 20

27 March 1969

### Legal Assistance to Retirees

#### 1. General Policy

a. The Office of General Counsel maintains a list of cleared lawyers in the Washington metropolitan area for its use and to assist in meeting requirements for legal aid as they may arise. Help for employees through selections from this list has always been given by OGC.

b. The Deputy General Counsel has advised that OGC will provide legal assistance and a name or names of outside lawyers to any employee in the process of planning for his retirement or in line with retirement counseling. OGC will suggest appropriate names to an employee after identifying the area of need and determining knowledgeable lawyers practicing in the area in which the employee resides.

#### 2. Procedures

a. Any employee expressing a need for legal assistance, while in the process of retirement counseling, will be placed in contact with [REDACTED] OGC, [REDACTED] [REDACTED] will serve as the focal point for OGC assistance of this type. However, in the case of senior officers (normally GS-15 or above), [REDACTED] Deputy General Counsel, ext. [REDACTED] has suggested that they could be referred to him or to [REDACTED] [REDACTED]

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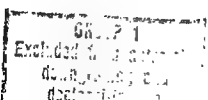
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b. Retirement counselors will make certain that any employee desiring referral to an outside lawyer is fully aware that the selection of such a person and any subsequent advice received will be strictly the employee's responsibility.

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Referral of Prospective Retirees  
from RCB to EEABGeneral

Prospective retirees may benefit from counseling by EEAB in matters pertaining to the preparation of documents or assistance in seeking post-retirement employment, or both. Referral of prospective retirees from RCB to EEAB will be in accordance with the policy and procedure described following.

Policy

The activities of any one branch of RAD, no matter how important in and by themselves, are also to be regarded as efforts complementary to those of the other branches toward the objective of ensuring the most efficacious processing of prospective retirees through RAD. The timely exchange of thoroughly developed information on each case will assist each branch in the succession of processing to work with a retiree in an efficient and professional manner.

Procedure

1. RCB is usually the point in RAD at which the first in-depth discussion takes place between a retiree and a counselor. Information developed during such an interview will materially assist a counselor in EEAB to appreciate rapidly the attitudes, motivations, problems and aspirations present in each individual case.
2. In addition to briefing a client on the various retirement benefits attendant upon his particular circumstances, the RCB counselor should determine the client's plans for the post-retirement period, the need for other employment, the realism of the client's appraisal of his own abilities and his aspirations for employment, the degree of his motivation, his attitude toward the process of assistance and the realization of the degree of effort he must put forth in his own behalf.
3. The counselor in RCB will, in addition to the check-off sheet "Planning for Retirement," prepare the supplemental sheet thereto for each client. This sheet should be prepared in legible longhand in order to contend with the delays in typing support because of higher priorities, and should definitely comment on the items noted in the preceding paragraph as determined during the interview. In those cases in which assistance from EEAB will be required, an EEAI sheet should be prepared.

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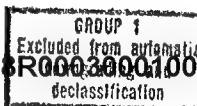
4. A client should not be referred to EEAB until after a counselor in that branch has had the opportunity to review the report prepared by the counselor in RCB and has had the opportunity to raise questions or ask for additional information, if necessary. For those persons who require assistance from EEAB, therefore, an appointment should be arranged at such time as will permit the counselor in EEAB sufficient opportunity for a careful review of the record from RCB.

5. The counselor in EEAB likewise should thoroughly document each of his interviews with the client in order to compile a useful record that may be used by other branches in RAD and, possibly, by the Retirement Board.

6. Persons who initiate inquiries into their retirement by visiting ROB or EEAB should be encouraged to avail themselves first of the services of RCB. Counselors in ROB or EEAB should refer such persons to RCB.

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RAD Internal Procedure  
No. 22

21 May 1969

Medical Examinations  
for Retirees

1. General Policy

Under an agreement reached between the Retirement Affairs Division and the Office of Medical Services, the latter has agreed to extend certain services to retiring employees. Specifically, that office has agreed to forward to an employee's doctor any items from the Agency's medical file on the employee which the employee believes his own doctor would find useful. In addition, retirees may contact the Office of Medical Services for other information or for a physical examination if desired.

2. Procedures

(a) Retiring personnel who wish their records sent to their own physician should be instructed to write a memorandum to the Registrar, OMS, in which he designates the doctor to whom the records are to be released, gives his address and specifies the items of record which he would like to have transmitted. The employee should state in the memorandum that he is retiring from the Agency and is requesting this service pursuant to the agreement between RAD and OMS.

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(b) Retiring employees who wish to have a consultation with an Agency doctor or to request an examination should call [REDACTED] on [REDACTED]. They should identify themselves as persons about to retire and request the services pursuant to the agreement between RAD and OMS. [REDACTED] who will make further arrangements, wishes the calls to come to him so that over a period of time he might discern a pattern in the requests. He will discuss his findings with RAD as a possible basis for revision of the procedures.

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(c) RAD Counselors will advise prospective retirees that this service is available to them.

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# Headquarters EMPLOYEE BULLETIN

Retirement Counseling Series #1

20 December 1967

## THE AGENCY RETIREMENT COUNSELING PROGRAM

1. The Director of Central Intelligence has approved a substantial expansion of the Agency's retirement counseling efforts. Senior officers representing the Agency's Career Services have been selected by the Deputy Directors and Heads of Independent Offices to participate in the preparation and development of a comprehensive Retirement Counseling Program (RCP).

2. The group is now in the early fact-finding phase in fulfillment of Agency plans and requirements. Interviews with Agency personnel who are about to retire and with Deputy Directors, Heads of Independent Offices, Operating Officials, and other senior officials are producing an ever-expanding collection of facts, opinions, and problems which are helping to shape the program. Additional comments and suggestions applicable to the development of the program are hereby solicited from all Agency employees and should be forwarded to [REDACTED] Chief, Retirement Counseling Program, Room 212, Magazine Building.

3. The major emphasis of the RCP is focused on the five-year period just prior to retirement. Seminars chaired by experts in various aspects of retirement are planned. The size of each seminar will be determined by the subject to be discussed. Large groups will be assembled for presentations on broad matters of general interest. Individual counseling, including external placement assistance where the need exists, will be coordinated with and will support Career Service counseling efforts.

4. Two Retirement Reading Rooms containing books, periodicals, and other literature on retirement and related subjects are being established--one at the Headquarters Building and one in the Rosslyn area for use by interested Agency employees. When the reading material is assembled, an announcement of the opening of these rooms will be circulated.

5. Periodic bulletins or notices will keep Agency employees abreast of all retirement planning activities. A system has also been devised for maintaining communication with retirees for the exchange of information.

DISTRIBUTION: ALL EMPLOYEES

# Headquarters EMPLOYEE BULLETIN

STATINTL

Retirement Counseling Series #2

13 February 1968

## SPECIAL RETIREMENT INFORMATION SEMINARS

1. Special Retirement Information Seminars are being arranged to help employees who are nearing retirement. The purpose of these seminars is to provide constructive information to enable Agency employees to plan an organized retirement and to approach it confidently. Two seminars will be presented in calendar year 1968. The first, in March, will be primarily for employees scheduled to retire between 1 April and 31 December 1968; the second, for employees scheduled to retire between 1 January and 31 December 1969, will be held in November. Personnel who are planning to retire within these periods will be asked to participate in these seminars. Other employees who are interested in starting to plan for their retirement after 1969 are cordially invited to attend all or a part of the sessions.

2. The first seminar, consisting of five two-hour sessions, will begin on 25 March 1968. All sessions will be held in the auditorium, Headquarters Building. The schedule and subjects are listed below:

SESSION I  
Monday, 25 March  
10 a.m. to 12 noon  
Disengagement and the Meaning  
of Retirement

SESSION III  
Wednesday, 27 March  
2 - 4 p.m.  
CIA and Civil Service  
Retirement - Financial Aspects -  
Social Security

SESSION V  
Friday, 29 March  
10 a.m. to 12 noon  
Part-time Employment and  
Second Careers

SESSION II  
Tuesday, 26 March  
10 a.m. to 12 noon  
Health and Housing

SESSION IV  
Thursday, 28 March  
10 a.m. to 12 noon  
Legal and Tax Aspects of  
Retirement - Banking

3. Some outside specialists will participate in this seminar. A question-and-answer period will follow each lecture to give employees opportunity to discuss points of particular interest.

4. Individuals, other than the 1968 retirees, desiring to attend the March seminar are asked to get in touch with the Retirement Counseling and Placement Staff, extension [REDACTED] no later than Wednesday, 20 March 1968. STATINTL

5. The exact date of the November seminar for employees retiring in calendar year 1969 will be announced by a subsequent bulletin. The schedule and subject matter will be essentially the same as in the March seminar.

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# Headquarters EMPLOYEE BULLETIN

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Retirement Counseling Series #3

9 January 1969

## FINANCIAL AND ESTATE PLANNING SEMINAR

1. In the process of counseling employees preparing to retire, the Office of Personnel has found that inadequate financial planning is the most common deterrent to retirement readiness. It has been determined further in discussion with individuals involved that one, two or even five years would allow insufficient time to properly prepare for a supplemental income to augment an anticipated retirement annuity. This is one aspect of planning which should be given constructive attention as early as possible and then refined as major personal and family requirements and income adjustments become known. To assist employees in their consideration and actions, a Financial and Estate Planning Seminar has been arranged to include insurance, investments, estate matters, and legal and tax subjects.

2. This seminar is primarily for employees approaching mid-career. Age forty appears to be a logical time for launching serious planning in the financial and estate fields - family needs are likely to be identified by that time and income patterns can be reasonably projected. For these reasons and to permit scheduling, this seminar is being held for those who will reach age forty sometime during calendar year 1969. Up to the limit of accommodations other interested employees are invited.

3. This seminar, consisting of three two-hour sessions, will begin on Tuesday, 25 February 1969 in the Headquarters Auditorium. Each year after 1969, a similar seminar will be held for forty-year-old employees. The 1969 Financial and Estate Planning Seminar schedule and subjects to be discussed are listed below and on the next page.

### SESSION I

Tuesday, 25 February  
10:00 a.m. to 12 Noon  
Pre-requisites for an  
Investment Program,  
Insurance

### SESSION II

Wednesday, 26 February  
10:00 a.m. to 12 Noon  
Estate Planning, Legal  
and Tax Aspects

SESSION III

Thursday, 27 February  
10:00 a.m. to 12 Noon  
Investments

4. Outside specialists will lead the discussions during the seminar. A question and answer period will be included with each lecture to give employees an opportunity to discuss points of particular interest.

5. Individuals, other than those in the forty age group, desiring to attend the seminar are asked to register by calling extension [REDACTED] no later than Friday, 14 February.

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# Headquarters EMPLOYEE BULLETIN

Retirement Counseling Series #4

26 March 1969

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## RETIREMENT INFORMATION SEMINAR

1. Retirement Information Seminars are designed to help employees who are nearing retirement. The purpose of the seminars is to provide constructive information to enable Agency employees to plan an organized retirement and to approach retirement with confidence. One of these general seminars will be presented in April for employees scheduled to retire between 1 July 1970 and 30 June 1972. Personnel who are planning to retire during this period will receive individual invitations to participate.

2. The seminar, consisting of four morning sessions, will begin on 22 April 1969. All sessions will be held in the Auditorium, Headquarters Building. The schedule and subjects are listed below:

### SESSION I

Tuesday, 22 April  
9:00 a.m. to 12 noon  
Disengagement and the Meaning  
of Retirement  
Social Security Benefits  
Items of  
General Interest

### SESSION II

Wednesday, 23 April  
9:30 a.m. to 12 noon  
Civil Service Benefits  
Housing

### SESSION III

Thursday, 24 April  
9:30 a.m. to 12 noon  
Financial Planning  
Legal Aspects and Banking

### SESSION IV

Friday, 25 April  
9:30 a.m. to 12 noon  
Health  
Second Career

3. Some outside specialists will participate in these seminars. A question and answer period will follow each lecture to give employees an opportunity to discuss points of particular interest.

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4. Individuals, other than those retiring between 1 July 1970 and 30 June 1972, interested in starting to plan for their retirement may attend all or part of the April seminar on a space-available basis. Applicants should get in touch with the Retirement Affairs Division, extension [REDACTED] no later than Friday, 11 April 1969.

DISTRIBUTION: ALL EMPLOYEES

**C-O-N-F-I-D-E-N-T-I-A-L**

23 May 1968

**OFFICE OF PERSONNEL MEMORANDUM NO. 20-50-2**

**SUBJECT: Extension of Agency Employment**

1. In October of each year the Retirement Counseling Branch, OP, will verify with each Career Service the monthly groupings of those scheduled to retire during the year commencing the second January following; one year and three months prior to the earliest possible retiree for the calendar year. For instance, this would mean that the review would be held in October 1968 for those scheduled to retire during the year 1970.
2. At the end of each month the Retirement Counseling Branch will check with each Career Service, the names from the master monitor (yearly list) of those employees who reached their twelfth month prior to retirement and were projected for interview in that month, during the annual October review.
3. Corrections, adjustments and deletions to the monthly list will be made jointly by the Retirement Counseling Branch and the Career Service.
4. The corrected monthly list will be checked by the Retirement Counseling Branch with the Executive Secretary, CIA Retirement Board, Technical Branch, OP, to bring his monitoring records for the Board up to date.
5. Each extension case appearing on the above monthly list will be included in the monitoring index of the Secretary, CIA Retirement Board. A soft file is set up on each retirement extension case for reference purposes for future action.
6. Upon receipt of a retirement extension request, a fact sheet is prepared on the case which includes comparative estimates as well as other pertinent details. The fact sheet, all memoranda on the case, and the biographic profile are reproduced in sufficient copies for inclusion in the books sent to each member of the CIA Retirement Board prior to the biweekly meetings. The case is then put on the agenda for action at the next Board meeting but not later than the end of the eleventh month prior to the employee's retirement month.

Group 1

**C-O-N-F-I-D-E-N-T-I-A-L**

7. Following consideration by the Board, a memorandum is written to the Director by the Secretary of the Board for signature of the Director of Personnel giving the details of the case, Career Service and Deputy Director or Head of Independent Office recommendations, Board recommendation, and Director of Personnel comment on the Board recommendation. Action involved will be completed and the case forwarded to the Director by the end of the tenth month prior to the employee's retirement month.

8. Upon receipt of the Director's decision a memorandum is written to the employee, through the appropriate Deputy Director or Head of Independent Office and Career Service, from the Director of Personnel informing him of the decision of the Director.

9. The card file is updated showing the action approved by the Director.

10. When in the course of regular retirement counseling, at any time between the five-year consultation and the employee's actual retirement, the Retirement Counseling Branch is given any indication that an employee has a problem calling for compassionate consideration which may lead to a request for extension, such information will be immediately conveyed to the appropriate Career Service for further examination and command action.

11. Supporting retirement information will be provided to headquarters components, and to field stations and bases through their appropriate headquarters offices by the Retirement Counseling Branch.

12. The Technical Branch and the Retirement Counseling Branch will develop forms and monitoring devices as required to simplify and aid the "Extension of Agency Employment."

/s/

Robert S. Wattles  
Director of Personnel

OPM 17-68

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3 May 1968

OFFICE OF PERSONNEL MEMORANDUM NO. 20-50-1

SUBJECT : Responsibility for Retirement Processing

REFERENCE: OPM 1-14-11, dated 21 March 1968

1. This memorandum supplements OPM 1-14-11 to provide further guidance regarding various aspects of the retirement program and processing of retirement matters.

2. In OPM 1-14-11, we mentioned our long-range plan to establish a Retirement Division when the Retirement Program is fully organized and functioning. During the current interim period the Retirement Counseling Branch (RCB) and the External Employment Assistance Branch (EEAB) are components of the Retirement Counseling and Placement Staff (RCPS), with Chief, RCPS reporting directly to the Director of Personnel. The Technical Branch (formerly Retirement Branch) will continue to be an element of BSD until the Retirement Division is activated. When the Retirement Division is activated it will consist of the three Branches identified above and will be placed under the Deputy Director of Personnel for Special Programs.

3. Primary functional responsibilities of the RCPS at the present time are as follows:

a. Office of the Chief/RCPS

- (1) Develop plans for broader retirement assistance programs.
- (2) Organize and establish specific facets of the Agency's retirement assistance programs.
- (3) Supervise RCB and EEAB activities.

b. Retirement Counseling Branch/RCPS

- (1) Serve as the initial contact point in the Office of Personnel for general retirement counseling.
- (2) Provide personal counseling services to employees seeking assistance and advice in connection with general retirement planning.

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(3) Prepare seminar presentations for group employee counseling.

c. External Employment Assistance Branch/RCPS

(1) Provide guidance to individuals in the preparation of their personal history resumes.

(2) Provide specific counseling to employees on planning job search efforts, techniques of application, and job interviews.

(3) Provide information regarding application for non-governmental and for U.S. Government employment (both nonstatus direct hire agencies and through Civil Service examinations).

4. As in the past, the Technical Branch/BSD will continue to provide information on the technical aspects of the CIA Retirement and Disability System and the Civil Service Retirement Act, final computations, reviews of past service, the process of effecting retirement, and the like. Personnel officers should also note that documentation concerning designation of participants in the CIA Retirement System, requests for extensions under the Agency's retirement policy, applications for retirement or for service credit or for refunds of retirement withholdings, designations of beneficiary, and similar papers should be forwarded to the Technical Branch for appropriate action.

5. Personnel officers are encouraged to call or advise employees to call RCPS or Technical Branch/BSD, as appropriate, on extension [redacted] respectively.

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[redacted]  
for Robert S. Wattles  
Director of Personnel

OPM 15-68

C-O-N-F-I-D-E-N-T-I-A-L

14 March 1969

OFFICE OF PERSONNEL MEMORANDUM NO. 1-14-13

SUBJECT : Implementation of Organizational Plan - Office of Personnel

REFERENCES: OPM 1-14-11, dated 21 March 1968  
OPM 20-50-1, dated 3 May 1968

1. This memorandum supplements OPM 1-14-11 and OPM 20-50-1 regarding our long-range plan to establish a Retirement Division at the time the Retirement Program became fully organized and functioning. During the interim period the Retirement Counseling Branch and the External Employment Assistance Branch have been components of the Retirement Counseling and Placement Staff, under the direction of [REDACTED] with the Retirement Operations Branch being an element of the Benefits and Services Division.

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2. Effective 17 March 1969 the Retirement Affairs Division is activated, with the three branches identified above becoming the elements of the Retirement Affairs Division. This Division will be placed under the Deputy Director of Personnel for Special Programs.

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3. [REDACTED] is appointed Chief, Retirement Affairs Division on 17 March 1969. Prior to reporting to his new assignment, [REDACTED] at the request of the Director of Personnel, will write the history of the Retirement Program during the past two years.

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[REDACTED]  
Robert S. Wattles  
Director of Personnel

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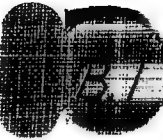
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TAB B

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RETIREMENT INFORMATION SEMINAR

NO. I

25 March - 29 March 1968

Monday, March 25, 1968

10:15 - 10:15

Introduction

Chief, Retirement Counseling  
and Placement Staff

10:15 - 10:45

Welcome

Director of Personnel

10:45 - 11:45

Disengagement and Meaning of  
Retirement



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Tuesday, March 26, 1968

10:00 - 11:00

Health

Director of Medical Services

11:00 - 12:00

Housing

E. Everett Ashley, Director,  
Statistical Reports and Analysis  
Staff, Office of Deputy Under  
Secretary, Department of Housing  
and Urban Development

Wednesday, March 27, 1968

10:00 - 10:15

CIA Retirement

D/Chief, Benefits and Services Division

10:15 - 11:00

Civil Service Benefits and Financial  
Aspects of Retirement

Lawrence D. Davis, Training Officer  
Bureau of Insurance and Claims,  
Civil Service Commission

Wednesday, March 27, 1968

11:00 - 12:00

Social Security Benefits

William Spates, Manager,  
Washington Office  
Social Security Administration

Thursday, March 28, 1968

10:00 - 10:30

Legal Aspects of Retirement

Associate General Counsel

10:30 - 11:15

Tax Aspects of Retirement

Speaker from Internal Revenue Service,  
U.S. Department of Treasury

11:15 - 12:00

Banking



STATINTL

Friday, March 29, 1968

10:00 - 11:00

Part-Time Employment

Robert B. Brown, Chief,  
Staff Services Division,  
U.S. Employment Service

11:00 - 12:00

Second Careers

 Management  
Consultant, Author and Speaker

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# RETIREMENT INFORMATION SEMINAR

No. 2

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18 - 22 November 1968

HEADQUARTERS AUDITORIUM

Approved For Release 2001/09/04 : CIA-RDP90-00708R000300010001-5

**Monday, 18 November 1968**

9:30 - 9:45 *Welcome*

Executive Director-Comptroller

9:45 - 10:15 *Introduction*

Chief, Retirement Counseling and Placement  
Staff

10:15 - 10:45 *Film: "The Rest of Your Life"*

10:45 - 11:00 *Intermission*

11:00 - 12:00 *Disengagement and Meaning of Retirement*



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**Tuesday, 19 November 1968**

9:30 - 10:00 *Health*

Director of Medical Services

10:00 - 10:50 *Organization and Civil Service Retirement  
Systems*

Deputy Director of Personnel for Special  
Programs

10:50 - 11:00 *Intermission*

11:00 - 12:00 *Housing*

MRS. MARIE C. MCGUIRE, Assistant to the Sec-  
retary on Policies Affecting Departmental  
Housing Programs, Department of Housing  
and Urban Development

**Wednesday, 20 November 1968**


9:30 - 10:40     *Civil Service Benefits*  
MR. LAWRENCE D. DAVIS, Training Officer,  
Bureau of Retirement and Insurance, Civil  
Service Commission

10:40 - 10:50     *Intermission*


10:50 - 12:00     *Social Security Benefits*  
MR. WILLIAM R. SPATES, Manager, Washing-  
ton Office, Social Security Administration

\* \* \* \* \*

**Thursday, 21 November 1968**

9:30 - 10:40     *Financial Planning*  


10:40 - 10:50     *Intermission*

10:50 - 12:00     *Legal Aspects and Banking*  


STATINTL


STATINTL

\* \* \* \* \*

**Friday, 22 November 1968**

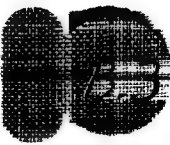
9:30 - 10:30     *Part-time Employment*  
MR. ROBERT B. BROWN, Chief, Staff Services,  
U.S. Employment Service

10:30 - 10:45     *Intermission*

10:45 - 12:00     *Second Career*  
 Management Consul-  
tant, Author and Speaker

STATINTL

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S-E-C-R-E-T

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MEMORANDUM FOR:

SUBJECT : Invitation to Attend the Financial and Estate  
Planning Seminar

1. I wish to extend to you a personal invitation to attend a Financial and Estate Planning Seminar. It has been arranged especially for those employees approaching their mid-careers and who will reach age forty sometime during calendar year 1969. By the time mid-career is reached, whether single or head of a family, a person should be giving serious thought to his future financial and related requirements. At the same time, he should be planning and projecting steps to meet these requirements.

25X1A 2. The Seminar, of three morning sessions, will be held in the Auditorium from 25 through 27 February 1969. It is expected that you will find all sessions interesting, informative and of considerable value. If you are married, your spouse is also cordially invited to attend since we believe that the Seminar will have much to offer a husband-wife team. A guard will be stationed at the entrance to the Auditorium and a visitor's badge will be issued to your spouse each morning. Please notify the RCPS office on [REDACTED] 14 February if you plan to come and also if you will bring your spouse. There is a wide interest in this Seminar and all accommodations will probably be taken up.

3. An agenda is attached for your information and guidance. Brochures and other printed matter will be available as handouts at the Seminar.

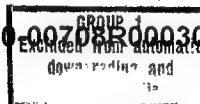
25X1A [REDACTED]

Chief, Retirement Counseling and Placement Staff

Attachment

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S-E-C-R-E-T





TOPICS

SESSION I

10:00 a.m. to 10:15 a.m.

Welcome - Director of Personnel

10:15 a.m. to 12 Noon

STATINTL

1. Seminar description and objectives - suggested reading material.
2. Basic pre-requisites for an investment program.
  - a. Adequate emergency reserves.
  - b. Forms of insurance.
  - c. Importance of a well-planned insurance program.
4. Insurance program to help you pay costs of a college education for your children.

SESSION II

10:00 a.m. to 10:50 a.m.

STATINTL

1. Estate planning.
2. Inflationary trends in the years ahead - the merits of investing versus trading - growth versus income - safeguards for the investor.
3. Research and selection of securities - sources of advice and information.
4. Types of securities - various vehicles for investments.

11:00 a.m. to 12 Noon

STATINTL

1. Legal safeguards for the investor.
2. Legal consideration relative to wills, gifts, trusts, and safe deposit boxes.
3. Tax savings.
4. Banking - advantages of safe investments with a fixed income.

SESSION III

10:00 a.m. to 12 Noon

STATINTL

1. The stock market and how it works.
2. Methods of investing and savings through investments.
3. Mutual funds, common stocks, closed-end investments, and tax sheltered investments.
4. Types of monthly investment plans and aggressive versus defensive investing.
5. Investment program to help you pay costs of a college education for your children.

CONTENTS

Estate, Legal, and Tax Aspects

1. Estate planning and wills.
2. Title to property and kinds of ownership including rights derived from ownership.
3. Importance of legal check list.
4. Gifts, trusts, and safe deposit boxes.
5. Banking - advantages of safe investments with fixed income.
6. Rights of survivorship.

Insurance

1. Types of insurance policies.
2. Importance of a well-planned insurance program.
3. Life insurance starts an estate of x dollars the moment the first premium is paid.
4. Re-evaluation of insurance program to fit your current and future needs.
5. Tax advantages of insurance.
6. Insurance program to help you pay for costs of a college education for your children.

Investments

1. Importance of choosing a broker.
2. What type of stocks and bonds are recommended and why.
3. Stocks and bonds as a hedge against inflation.
4. Advantages and disadvantages of mutual funds.
5. Real estate can be a valuable investment.
6. Investment program to help you pay for costs of a college education for your children.

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RETIREMENT INFORMATION SEMINAR EVALUATION

1. How do you rate the entire seminar?

☐ Excellent    ☐ Very Good    ☐ Average    ☐ Fair    ☐ Unsatisfactory

2. Program Strengths

3. Program Weaknesses

4. Please rate the following using E for excellent, VG for very good, A for average, F for fair and U for unsatisfactory.

STATINTL



Disengagement \_\_\_\_\_  
Social Security \_\_\_\_\_  
Civil Service \_\_\_\_\_  
Housing \_\_\_\_\_  
Financial Planning \_\_\_\_\_  
Legal Aspects and Banking \_\_\_\_\_  
"The Rest of Your Life" \_\_\_\_\_  
Second Career \_\_\_\_\_

5. General comments, recommendations or criticisms which you may wish to make.

PLEASE RETURN THIS EVALUATION SHEET TO ROOM 212 MAGAZINE BUILDING. YOU NEED NOT SIGN IT. If you need additional advice and counsel on any subject pertaining to your retirement, please call extension

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PLANNING FOR RETIREMENT

		Not a Problem	Unresolved (Clarify)	Yes	No
SECTION I	BEGIN YOUR PLAN EARLY				
	1. Have you decided what you intend to do when you retire?				
	2. Have you begun serious and considered planning to fulfill your retirement plans?				
	*3. Are you aware of the benefits, provisions, entitlements, and options of your retirement system?				
	*4. Have you worked up an estimate of your annuity projected to your scheduled retirement month and the month when you become eligible for optional retirement?				
	*5. Have you recently assembled your vital documents and personal records essential to orderly planning? Are they in a secure and readily accessible place?				

\* Denotes literature is available in the form of handouts in RAD office.

	Not a Problem	Unresolved (Clarify)	Yes	No
SECTION II FINANCIAL PLANNING				
*1. Have you made a realistic calculation of your net worth (assets less obligations) and an analysis of your current spending patterns?				
2. Have you considered possible changes in your present mode of living, including less expensive housing, fewer luxury items, etc. to enable you to live within your reduced retirement income?				
3. Have you calculated your retirement income as of a specified date and matched it against current, continuing or future additional financial obligations?				
*4. Do you have other income or eligibility for future income in addition to your retirement annuity? Check, if applicable?				
Social Security _____				
Veteran's benefits _____				
Income from investments _____				
Other _____				
*5. Have you recently familiarized yourself on your life insurance holdings and benefits in light of your retirement needs with the insurance branch? Check, if applicable?				

(Continued)

		Not a Problem	Unresolved (Clarify)	Yes	No
UBLIC					
FEGLI					
WAEPA					
Mortgage Insurance					
GI					
Other					
<hr/>					
SECTION III TO WORK OR NOT TO WORK (Consider self and spouse)					
1. Will you need to work after retirement for financial reasons?					
2. Are there modifications which might be made in your present retirement plan to make employment after retirement optional rather than essential?					
3. Have you established the minimum supplemental income, over and above your annuity, which will meet your financial needs?					
4. Even if not financially necessary, is work desired because of its interest to you as a type of activity?					
5. (a) Do you have hobbies or avocations? (b) Can they be converted to income producing activities?					



	Not a Problem	Unresolved (Clarify)	Yes	No
6. Should you improve or develop any skills or techniques, acquire any knowledge, training or experience in preparing to enter a new field of interest?				
7. Have you acquainted yourself with the labor market opportunities, salary ranges, etc. in the desired locations and fields of employment that you might wish to pursue?				
8. Have you realistically evaluated your background and qualifications in terms of your prospects for employment?				
9. Are you acquainted with the job search counseling and employment assistance available to you through the External Employment Assistance Branch of the Retirement Affairs Division?				
10. Have you completed your Summary of Agency Employment?				
SECTION IV WHERE TO LIVE				
*1. Have you considered several alternatives for your home location after retirement?				

	Not a Problem	Unresolved (Clarify)	Yes	No
*2. Has the cost (living, local taxes, etc.) of the areas tentatively selected been given full consideration?				
*3. Have you determined the climate desired?				
4. Have employment opportunities in the area(s) under consideration if applicable, been examined?				
5. Have you considered the cultural and recreational features of various areas?				
6. Have you evaluated the importance of family considerations?				
7. Have you tested the locations under consideration by spending a couple of weeks or a vacation in each to check the details of living there?				
SECTION V HEALTH PLANNING				
1. Have you decided whether your present medical and hospital insurance plan is adequate for your retirement needs? See Insurance Branch for advice.				

	Not a Problem	Unresolved (Clarify)	Yes	No
*2. Are you aware that you may retain your government health benefits insurance coverage after retirement if eligibility is established?				
*3. Are you familiar with eligibility criteria for Medicare?				
*4. Are you aware of pre-retirement services which are available to you through the Office of Medical Services?				
5. Have you considered and planned for your retirement environment factors conducive to good health and longevity such as opportunities for exercise and recreation, available medical care, etc.?				

SECTION VI PERSONAL CONSIDERATIONS  
(Employee's Use Only)

1. Indicate here any strictly personal factors that you wish to maintain for future reference.

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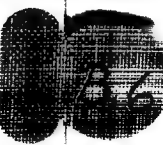
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SECTION VII    ADDITIONAL INFORMATION

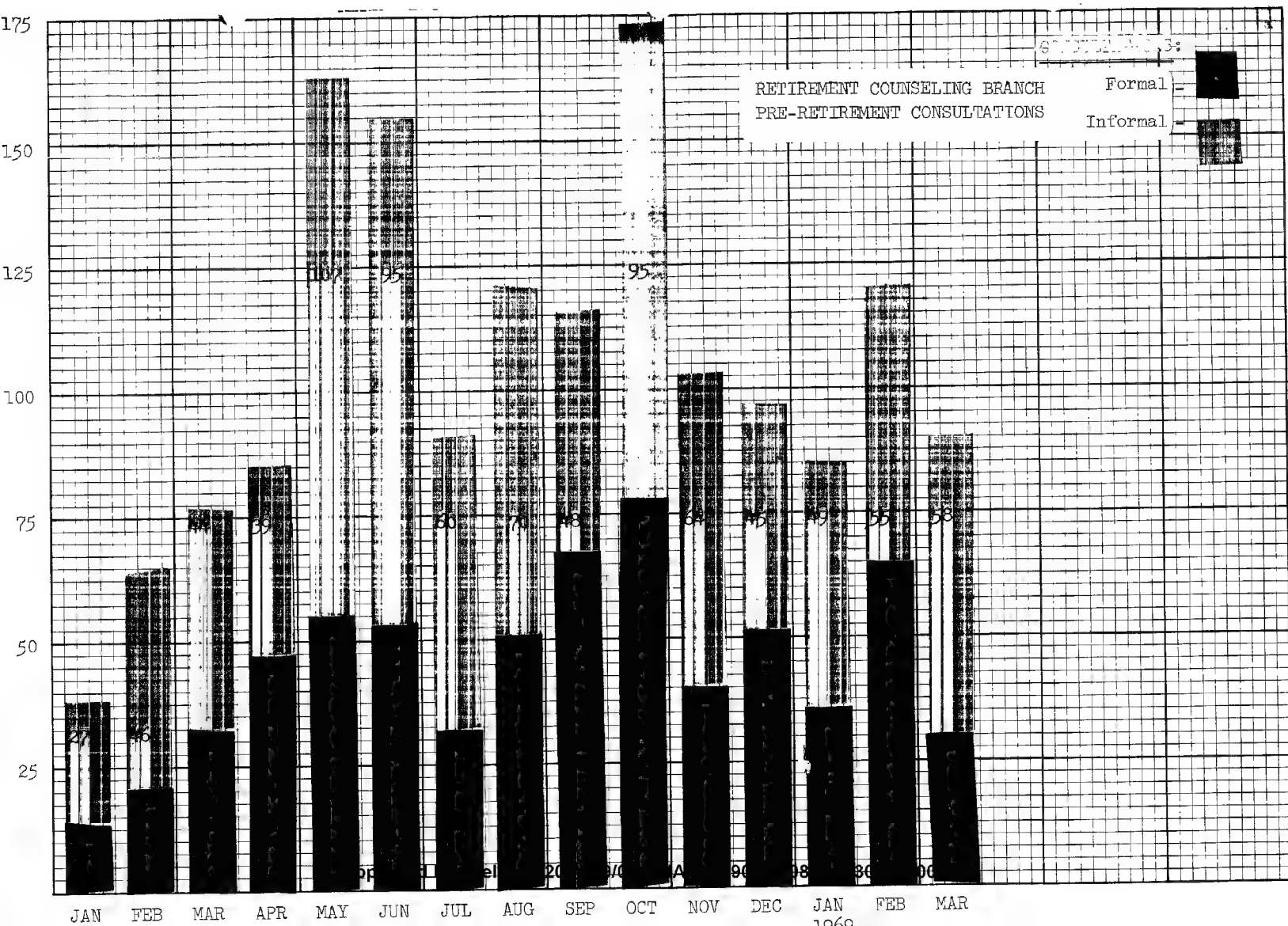
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# CIA R&D SYSTEM

## RETIREMENT MONTHLY ANNUITY RATES

(Computed at 2% for every year of service)

### KEY TO ANNUITY RATES IN TABLE

A—Monthly annuity to retired employee if survivor benefit is not elected.

B—Monthly annuity to retired employee with maximum benefit to surviving spouse.

The maximum benefit to surviving spouse of retired employee, or benefit to widow or dependent widower of employee whose death occurs before retirement, is approximately 55% of rate A.

**NOTE.**—1. Service for which retirement deductions were withheld and later refunded cannot be counted unless the refund is redeposited.

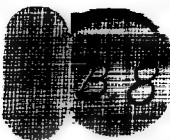
2. Rates shown are subject to reduction if service includes any civilian time after August 1, 1920, for which no retirement deductions were withheld or deposited. Monthly reduction in retired employee's annuity for this reason is  $\frac{1}{2}$  of 10% of the amount due as deposit. Monthly reduction for surviving spouse is 55% of monthly reduction in retired employee's annuity.

3. If retirement is on account of total disability, the rates shown as payable to the retired employee (A and B) are subject to increase if he qualifies for the guaranteed minimum disability annuity.

Years of Service		AVERAGE ANNUAL SALARY (5 Highest Consecutive Years)																										Years of Service
		\$7,000	\$8,000	\$9,000	\$10,000	\$11,000	\$12,000	\$13,000	\$14,000	\$15,000	\$16,000	\$17,000	\$18,000	\$19,000	\$20,000	\$21,000	\$22,000	\$23,000	\$24,000	\$25,000	\$26,000	\$27,000	\$28,000					
5	A	58	67	75	83	92	100	108	117	125	133	142	150	158	167	175	183	192	200	208	217	225	233	A	5			
	B	57	65	73	81	90	98	105	114	122	130	138	146	154	163	171	178	187	195	203	212	219	227	B				
6	A	70	80	90	100	110	120	130	140	150	160	170	180	190	200	210	220	230	240	250	260	270	280	A	6			
	B	68	78	88	98	107	117	127	137	146	156	166	176	185	195	205	215	224	234	244	254	263	273	B				
7	A	82	93	105	117	128	140	152	163	175	187	198	210	222	233	245	257	268	280	292	303	315	327	A	7			
	B	80	91	102	114	125	137	148	159	171	182	193	205	216	227	239	251	261	273	285	295	306	317	B				
8	A	93	107	120	133	147	160	173	187	200	213	227	240	253	267	280	293	307	320	333	347	360	373	A	8			
	B	91	104	117	130	143	157	169	182	195	208	221	234	247	260	273	286	299	311	322	335	347	358	B				
9	A	105	120	135	150	165	180	195	210	225	240	255	270	285	300	315	330	345	360	375	390	405	420	A	9			
	B	102	117	132	146	161	176	190	205	219	234	248	263	278	293	306	320	333	347	360	374	387	401	B				
10	A	117	133	150	167	183	200	217	233	250	267	283	300	317	333	350	367	383	400	417	433	450	467	A	10			
	B	114	130	146	163	178	195	212	227	244	260	276	293	308	322	338	353	367	383	398	412	428	443	B				
11	A	128	147	165	183	202	220	238	257	275	293	312	330	348	367	385	403	422	440	458	477	495	513	A	11			
	B	125	143	161	178	197	215	232	251	268	286	303	320	336	353	369	385	402	419	435	452	468	484	B				
12	A	140	160	180	200	220	240	260	280	300	320	340	360	380	400	420	440	460	480	500	520	540	560	A	12			
	B	137	156	176	195	215	234	254	273	293	311	329	347	365	383	401	419	437	455	473	491	509	527	B				
13	A	152	173	195	217	238	260	282	303	325	347	368	390	412	433	455	477	498	520	542	563	585	607	A	13			
	B	148	169	190	212	232	254	275	295	315	335	354	374	393	412	432	452	471	491	510	529	549	569	B				
14	A	163	187	210	233	257	280	303	327	350	373	397	420	443	467	490	513	537	560	583	607	630	653	A	14			
	B	159	182	205	227	251	273	295	317	338	358	380	401	421	441	464	484	506	527	547	569	590	610	B				
15	A	175	200	225	250	275	300	325	350	375	400	425	450	475	500	525	550	575	600	625	650	675	700	A	15			
	B	171	195	219	244	268	293	315	338	360	383	405	428	450	473	495	518	540	563	585	608	630	653	B				
16	A	187	213	240	267	293	320	347	373	400	427	453	480	507	533	560	587	613	640	667	693	720	746	A	16			
	B	182	208	234	260	286	311	335	358	383	407	430	455	479	502	527	551	574	599	623	646	671	694	B				
17	A	198	227	255	283	312	340	368	397	425	453	482	510	538	567	595	623	652	680	708	737	765	793	A	17			
	B	193	221	248	276	303	329	354	380	405	430	456	482	507	533	558	583	609	635	660	686	711	736	B				
18	A	210	240	270	300	330	360	390	420	450	480	510	540	570	600	630	660	690	720	750	780	810	840	A	18			
	B	205	234	263	293	320	347	374	401	428	455	482	509	536	563	590	617	644	671	698	725	752	779	B				
19	A	222	253	285	317	348	380	412	443	475	507	538	570	602	633	665	697	728	760	792	823	855	886	A	19			
	B	216	247	278	308	338	365	393	421	450	479	507	536	564	592	621	650	678	707	735	763	792	820	B				
20	A	233	267	300	333	367	400	433	467	500	533	567	600	633	667	700	733	767	800	833	867	900	933	A	20			
	B	227	260	293	322	353	383	412	443	473	502	533	563	592	623	653	682	713	743	772	803	833	862	B				
21	A	245	280	315	350	385	420	455	490	525	560	595	630	665	700	735	770	805	840	875	910	945	980	A	21			
	B	239	273	306	338	369	401	432	464	495	527	558	590	621	653	684	716	747	779	810	842	873	905	B				
22	A	257	293	330	367	403	440	477	513	550	587	623	660	697	733	770	807	843	880	917	953	990	1,027	A	22			
	B	251	286	320	353	385	419	452	484	518	551	583	617	650	682	716	749	781	815	848	880	914	947	B				
23	A	268	307	345	383	422	460	498	537	575	613	652	690	728	767	805	843	882	920	958	997	1,035	1,073	A	23			
	B	261	299	333	367	402	437	471	506	540	574	609	644	678	713	747	781	816	851	885	920	954	988	B				
24	A	280	320	360	400	440	480	520	560	600	640	680	720	760	800	840	880	920	960	1,000	1,040	1,080	1,120	A	24			
	B	273	311	347	383	419	455	491	527	563	599	635	671	707	743	779	815	851	887	923	959	995	1,031	B				
25	A	292	333	375	417	458	500	542	583	625	667	708	750	792	833	875	917	958	1,000	1,042	1,083	1,125	1,166	A	25			
	B	285	322	360	398	435	473	510	547	585	623	660	698	735	772	810	848	885	923	960	997	1,035	1,072	B				
26	A	303	347	390	433	477	520	563	607	650	693	737	780	823	867	910	953	997	1,040	1,083	1,127	1,170	1,213	A	26			
	B	295	335	374	412	452	491	529	569	608	646	686	725	763	803	842	880	920	959	997	1,037	1,076	1,114	B				
27	A	315	360	405	450	495	540	585	630	675	720	765	810	855	900	945	990	1,035	1,080	1,125	1,170	1,215	1,260	A	27			
	B	306	347	387	428	468	509	549	590	630	671	711	752	792	833	873	914	954	995	1,035	1,076	1,116	1,157	B				
28	A	327	373	420	467	513	560	607	653	700	747	793	840	887	933	980	1,027	1,073	1,120	1,167	1,213	1,260	1,307	A	28			
	B	317	358	401	446	484	527	569	610	653	694	736	779	821	862	905	947	988	1,031	1,073	1,114	1,157	1,199	B				
29	A	338	387	435	483	532	580	628	677	725	773	822	870	918	967	1,015	1,063	1,112	1,160	1,208	1,257	1,305	1,353	A	29			
	B	327	371	414	457	501	545	588	632	675	718	762	806	849	893	936	979	1,023	1,067	1,110	1,154	1,197	1,240	B				
30	A	350	400	450	500	550	600	650	700	750	800	850	900	950	1,000	1,050	1,100	1,150	1,200	1,250	1,300	1,350	1,400	A	30			
	B	338	383	428	473	518	563	608	653	698	743	788	833	878	923	968	1,013	1,058	1,103	1,148	1,193	1,238	1,283	B				
31	A	362	413	465	517	568	620	672	723	775	827	878	930	982	1,033	1,085	1,137	1,188	1,240	1,292	1,343	1,395	1,446	A	31			
	B	348	394	441	488	534	581	627	673	720	767	813	850	906	952	999	1,046	1,092	1,139	1,185	1,231	1,278	1,324	B				
32	A	373	427	480	533	587	640	693	747	800	853	907	960	1,013	1,067													



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3 March 1969


MEMORANDUM FOR: Secretary, CIA Retirement Board

SUBJECT : Status of Extension Requests for Employees  
Scheduled for Retirement in February 1970

1. Attached, for your information, is a listing of Agency employees who are scheduled for retirement in February 1970, and who have requested, or are planning to request, an extension of Agency employment.

2. The "Remarks" column indicates the present status of such extension requests as determined by a canvass of the Career Services.

25X1A

  
Chief, Retirement Counseling & Placement Staff

Attachment:  
a/s

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DIRECTORATE:

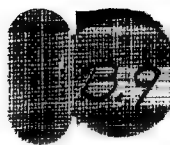
MONTH: \_\_\_\_\_

NAME	CAREER SERVICE	*A	*C	SCHEDULED RETIREMENT	EXTENSION DATE	REMARKS (Include All New or Changed Information)

\*A - Agency Need  
\*C - Compassionate

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NAME		GRADE	SB	ORG
DOB		SCD	RETIREMENT SYSTEM	
RETIREMENT ADDRESS				
COMMENTS				

TYPE OF RETIREMENT	DATE(S) EFFECTIVE	LOCATION OF DOSSIER	CHECK
MANDATORY (Scheduled)		RETIREMENT COUNSELING BRANCH	
VOLUNTARY (eligible)		EXTERNAL EMPLOYMENT ASSISTANCE BRANCH	
DISABILITY		TECHNICAL BRANCH	
INVOLUNTARY		DOCUMENT CENTER	

FORM 2881 RETIREMENT COUNSELING (4)

NAME		GRADE	SB	ORG
DOB		SCD	RETIREMENT SYSTEM	
RETIREMENT ADDRESS				
COMMENTS				

TYPE OF RETIREMENT	DATE(S) EFFECTIVE	LOCATION OF DOSSIER	CHECK
MANDATORY (Scheduled)		RETIREMENT COUNSELING BRANCH	
VOLUNTARY (eligible)		EXTERNAL EMPLOYMENT ASSISTANCE BRANCH	
DISABILITY		TECHNICAL BRANCH	
INVOLUNTARY		DOCUMENT CENTER	

FORM 2881 RETIREMENT COUNSELING (4)

ITEM	CHECK	ITEM	CHECK	ITEM	CHECK
INITIAL CONTACT		DOSSIER OPENED		CONSULTATION	
5 YEAR LETTER		MEMORANDUM FOR RECORD		SEMINAR	
MATERIAL GIVEN		PHOTOGRAPH		APPLICATION SIGNED	
INFORMATION ASSISTANCE		DRAFT RESUME		TECHNICAL SUP. GIVEN	
		APPROVED RESUME			
		JOB LEAD			
SECRET					

ITEM	CHECK	ITEM	CHECK	ITEM	CHECK
INITIAL CONTACT		DOSSIER OPENED		CONSULTATION	
5 YEAR LETTER		MEMORANDUM FOR RECORD		SEMINAR	
MATERIAL GIVEN		PHOTOGRAPH		APPLICATION SIGNED	
INFORMATION ASSISTANCE		DRAFT RESUME		TECHNICAL SUP. GIVEN	
		APPROVED RESUME			
		JOB LEAD			
SECRET					

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RECORD  
OF MY  
IMPORTANT PAPERS

\_\_\_\_\_  
Name:

\_\_\_\_\_  
Date:



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This is a list of important records for the protection of your family and heirs. It is intended for your spouse, executor, legal adviser, or principal heir.

The pages of this record are flexible and for such use as you may desire. They are stapled if you wish to keep them together. They are punched if you wish to insert them in a loose-leaf binder—this will permit saving unchanged pages when you bring your records up to date. This record should be kept in a safe place but be immediately accessible to your spouse or principal survivor in the event of need.

SHOULD I BE UNABLE TO ACT FOR MYSELF, HERE IS A  
RECORD OF WHOM TO SEE, WHAT TO LOOK FOR, AND  
WHERE TO LOOK.

By \_\_\_\_\_  
(Signature)

Date \_\_\_\_\_

Legal Residence (State) \_\_\_\_\_

#### A. PERSONAL DATA

1. Name (print) \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Place of birth \_\_\_\_\_

2. Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_

(See Item B-7 if no birth certificate)

3. Naturalization certificate, if any (No., date, etc.) \_\_\_\_\_

Date of citizenship \_\_\_\_\_  
Location of record \_\_\_\_\_

4. Marriage license No. \_\_\_\_\_ Certificate No. \_\_\_\_\_  
Date of issue \_\_\_\_\_ Place \_\_\_\_\_  
Date of marriage \_\_\_\_\_ Place \_\_\_\_\_  
Person officiating \_\_\_\_\_  
Location of records \_\_\_\_\_

5. Divorce papers, if any \_\_\_\_\_  
Date \_\_\_\_\_ Place \_\_\_\_\_  
Court \_\_\_\_\_  
Location of record \_\_\_\_\_

6. Church affiliations  
Name of church \_\_\_\_\_  
Address \_\_\_\_\_  
Position held (if any) \_\_\_\_\_  
Names, addresses, and telephone numbers of ministers, priests, or  
rabbis to be notified \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Military service  
Serial number(s) \_\_\_\_\_  
Branch(es) \_\_\_\_\_  
Period(s) of service \_\_\_\_\_  
Location of discharge papers \_\_\_\_\_
8. Veterans (\_\_\_\_\_) or Employees' Compensation (\_\_\_\_\_) Claim  
Information (Indicate which)  
Nature of any claim \_\_\_\_\_  
Claim No. \_\_\_\_\_ Submitted \_\_\_\_\_  
Grant, rating, or result \_\_\_\_\_ Date \_\_\_\_\_  
Date of last action \_\_\_\_\_ Result \_\_\_\_\_  
Compensation rate \$ \_\_\_\_\_ As of \_\_\_\_\_  
Other pertinent information \_\_\_\_\_
9. Fraternal, civic, or professional organizations  
Organization \_\_\_\_\_  
Address \_\_\_\_\_  
Benefits \_\_\_\_\_  
Organization \_\_\_\_\_  
Address \_\_\_\_\_  
Benefits \_\_\_\_\_  
Organization \_\_\_\_\_  
Address \_\_\_\_\_  
Benefits \_\_\_\_\_

#### B. FAMILY DATA

1. Name of spouse (maiden name, if wife) \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Place of birth \_\_\_\_\_  
Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_  
Naturalized? \_\_\_\_\_ When \_\_\_\_\_  
Where \_\_\_\_\_  
Deceased? \_\_\_\_\_ Date \_\_\_\_\_ Place \_\_\_\_\_  
Place of burial \_\_\_\_\_  
Death certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_

2. Name of father \_\_\_\_\_  
Address, if living \_\_\_\_\_  
\_\_\_\_\_  
Telephone number (incl. area code) \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Place of birth \_\_\_\_\_  
Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
\_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_  
\_\_\_\_\_  
Naturalized? \_\_\_\_\_ When \_\_\_\_\_  
Where \_\_\_\_\_  
Deceased? \_\_\_\_\_ Date \_\_\_\_\_ Place \_\_\_\_\_  
Place of burial \_\_\_\_\_  
Death certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
\_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_  
\_\_\_\_\_  
3. Name of mother \_\_\_\_\_  
Address, if living \_\_\_\_\_  
\_\_\_\_\_  
Telephone number (incl. area code) \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Place of birth \_\_\_\_\_  
Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
\_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_  
\_\_\_\_\_  
Naturalized? \_\_\_\_\_ When \_\_\_\_\_  
Where \_\_\_\_\_  
Deceased? \_\_\_\_\_ Date \_\_\_\_\_ Place \_\_\_\_\_  
Place of burial \_\_\_\_\_  
Death certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
\_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_  
\_\_\_\_\_  
4. Name of spouse's father \_\_\_\_\_  
Address, if living \_\_\_\_\_  
Telephone number (incl. area code) \_\_\_\_\_  
His date of birth \_\_\_\_\_  
His place of birth \_\_\_\_\_  
Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
\_\_\_\_\_

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Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_

Naturalized? \_\_\_\_\_ When \_\_\_\_\_  
Where \_\_\_\_\_

Deceased? \_\_\_\_\_ Date \_\_\_\_\_ Place \_\_\_\_\_  
Place of burial \_\_\_\_\_  
Death certificate (No., date, jurisdiction, etc.) \_\_\_\_\_

Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_

5. Name of spouse's mother \_\_\_\_\_  
Address, if living \_\_\_\_\_

Telephone number (incl. area code) \_\_\_\_\_  
Her date of birth \_\_\_\_\_  
Her place of birth \_\_\_\_\_  
Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_

Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_

Naturalized? \_\_\_\_\_ When \_\_\_\_\_  
Where \_\_\_\_\_

Deceased? \_\_\_\_\_ Date \_\_\_\_\_ Place \_\_\_\_\_  
Place of burial \_\_\_\_\_  
Death certificate (No., date, jurisdiction, etc.) \_\_\_\_\_

Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_

6. Names (maiden and married, where applicable) and birth dates of children (and present addresses and telephone numbers, if different from my address).

a. Name \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Place of birth \_\_\_\_\_  
Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_

Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_

Address \_\_\_\_\_

Telephone number (incl. area code) \_\_\_\_\_  
Office \_\_\_\_\_ Home \_\_\_\_\_

- b. Name \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Place of birth \_\_\_\_\_  
Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
\_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_  
\_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Telephone number (incl. area code)  
Office \_\_\_\_\_ Home \_\_\_\_\_
- c. Name \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Place of birth \_\_\_\_\_  
Birth certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
\_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_  
\_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Telephone number (incl. area code)  
Office \_\_\_\_\_ Home \_\_\_\_\_
- d. Any children deceased? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If "Yes," complete items below:  
Name (maiden and married where applicable) \_\_\_\_\_  
\_\_\_\_\_  
Date of birth \_\_\_\_\_  
Place of birth \_\_\_\_\_  
Date of death \_\_\_\_\_  
Place of death \_\_\_\_\_  
Place of burial \_\_\_\_\_  
Death certificate (No., date, jurisdiction, etc.) \_\_\_\_\_  
\_\_\_\_\_  
Location of certificate \_\_\_\_\_  
Place where certificate can be secured \_\_\_\_\_  
\_\_\_\_\_  
Deceased child's spouse  
Spouse's name (maiden, if applicable) \_\_\_\_\_  
\_\_\_\_\_  
(current, if changed) \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Telephone number (incl. area code)  
Office \_\_\_\_\_ Home \_\_\_\_\_  
Deceased child's children  
Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone number (incl. area code) \_\_\_\_\_

Office \_\_\_\_\_ Home \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone number (incl. area code) \_\_\_\_\_

Office \_\_\_\_\_ Home \_\_\_\_\_

e. Any other closely related survivors

Name \_\_\_\_\_

Relationship \_\_\_\_\_

Husband's or wife's name \_\_\_\_\_

Address \_\_\_\_\_

Telephone number (incl. area code) \_\_\_\_\_

Office \_\_\_\_\_ Home \_\_\_\_\_

Name \_\_\_\_\_

Relationship \_\_\_\_\_

Husband's or wife's name \_\_\_\_\_

Address \_\_\_\_\_

Telephone number (incl. area code) \_\_\_\_\_

Office \_\_\_\_\_ Home \_\_\_\_\_

7. Affidavit as to birth

If you, your spouse, or parent of either, have no birth certificate, and have not been able to obtain one, it is important that you prepare an affidavit as to birth with appropriate legal advice. It should be a statement, signed and witnessed, that shows where you were born (country, state, county, city); when you were born; your name at birth and any other names used; reason why there is no certificate or record; and cite any available supporting authentication.

Location of affidavit \_\_\_\_\_

Comment \_\_\_\_\_

C. PERSONS TO BE NOTIFIED IN EMERGENCY

(In addition to spouse, children, living parents of self or spouse, and ministers, priests, or rabbis)

1. Employer contact \_\_\_\_\_

Telephone \_\_\_\_\_

Address \_\_\_\_\_

(See also items A-6, A-9, D-1, J, K, R, and insurance agents)

Telephone number (incl. area code)  
Office \_\_\_\_\_ Home \_\_\_\_\_

2. Name \_\_\_\_\_  
Relationship \_\_\_\_\_  
Address \_\_\_\_\_

Telephone number (incl. area code)  
Office \_\_\_\_\_ Home \_\_\_\_\_

3. Name \_\_\_\_\_  
Relationship \_\_\_\_\_  
Address \_\_\_\_\_

Telephone number (incl. area code)  
Office \_\_\_\_\_ Home \_\_\_\_\_

#### D. EMPLOYMENT AND RETIREMENT

1. Present employer  
Agency \_\_\_\_\_  
Bureau \_\_\_\_\_  
Address \_\_\_\_\_

Date employed \_\_\_\_\_  
Whom to contact (name, title) \_\_\_\_\_

Personnel officer \_\_\_\_\_

2. U.S. Civil Service retirement information  
Period(s) of employment covered (dates) \_\_\_\_\_

Any periods not covered, or for which contributions not yet paid up?  
(dates) \_\_\_\_\_

Location of Certificate of Membership \_\_\_\_\_

Location of Designation of Beneficiary (if any) (SF 2808) for any  
lump sum payment \_\_\_\_\_

3. My Social Security number is \_\_\_\_\_  
Location of card \_\_\_\_\_

Are you fully insured? \_\_\_\_\_ Yes \_\_\_\_\_ No

Currently insured? \_\_\_\_\_ Yes \_\_\_\_\_ No

4. Social Security numbers of family members  
Spouse \_\_\_\_\_ 2nd child \_\_\_\_\_  
1st child \_\_\_\_\_ 3rd child \_\_\_\_\_



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E. BANKING AND SAVINGS INFORMATION

Thousands of unclaimed bank accounts are advertised in the papers every year because the depositor did not tell his family about them. Designate joint accounts and list the joint names.

1. Checking account

Bank name \_\_\_\_\_ Account No. \_\_\_\_\_

Address \_\_\_\_\_

In whose name(s) \_\_\_\_\_

Location of records \_\_\_\_\_

Person who has the power to sign checks for me: \_\_\_\_\_

2. Savings account

Name of institution \_\_\_\_\_

Account No. \_\_\_\_\_

Address \_\_\_\_\_

In whose name(s) \_\_\_\_\_

Location of book \_\_\_\_\_

3. Savings account

Name of institution \_\_\_\_\_

Account No. \_\_\_\_\_

Address \_\_\_\_\_

In whose name(s) \_\_\_\_\_

Location of book \_\_\_\_\_

4. Safety deposit box No. \_\_\_\_\_

Bank or institution \_\_\_\_\_

Location of branch or office \_\_\_\_\_

In whose name(s) \_\_\_\_\_

Location of key \_\_\_\_\_

5. Location of home records depository \_\_\_\_\_

Location of key or combination \_\_\_\_\_

Custodian or depository (if in care of someone else) \_\_\_\_\_

6. Credit union \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

In whose name(s) \_\_\_\_\_

Location of book \_\_\_\_\_

Person to contact \_\_\_\_\_

Location and telephone number \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### F. PERSONAL INSURANCE POLICIES

Policies and premium receipts should be preserved in a safe place. Occasionally review your policies to exercise any options or rights of conversion and to insure proper beneficiary designation. The employing agency, or the Civil Service Commission, will furnish information on U.S. Government sponsored insurance programs.

#### *Life Insurance*

Amount of policy \$ \_\_\_\_\_ as of \_\_\_\_\_ (Date) \_\_\_\_\_  
Beneficiaries, if specified \_\_\_\_\_  
\_\_\_\_\_

Location of Designation of Beneficiaries \_\_\_\_\_  
Location of certificate \_\_\_\_\_  
\_\_\_\_\_

(Indicate which is applicable, if any)

*U.S. Government Life (WW I Veterans)*  
*National Service Life Insurance (WW II and Korean War Veterans) or*  
*Servicemen's Group Life Insurance (since September 28, 1965)*  
Amount of policy \$ \_\_\_\_\_ as of \_\_\_\_\_ (Date) \_\_\_\_\_

No. \_\_\_\_\_  
Policy numbers \_\_\_\_\_  
Issue date of policy \_\_\_\_\_ Insured's age at issue \_\_\_\_\_  
Annual premium \$ \_\_\_\_\_ Paid up to \_\_\_\_\_  
Beneficiaries, if specified \_\_\_\_\_  
\_\_\_\_\_

Location of Designation of Beneficiaries \_\_\_\_\_  
\_\_\_\_\_

Location of policy(ies) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Instructions \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Policy loans \_\_\_\_\_ Amount \$ \_\_\_\_\_ on Policy No. \_\_\_\_\_  
as of \_\_\_\_\_ (Date) \_\_\_\_\_

Amount \$ \_\_\_\_\_ on Policy No. \_\_\_\_\_  
as of \_\_\_\_\_ (Date) \_\_\_\_\_

Knowledge of the location of such policies can help the family make immediate claim if you are disabled. The employing agency, or if retired the Civil Service Commission will furnish information on the Federal Health Benefits program. An employee's surviving wife or husband or children may be able to continue the Federal Health Benefits coverage provided: (1) employee was enrolled for himself and family and had completed 5 years of civilian service, and (2) employee's wife or husband and children are eligible to receive a survivor's annuity under the Federal Civil Service system.

Company or issuing agency \_\_\_\_\_  
Policy number \_\_\_\_\_ Issue date \_\_\_\_\_  
Monthly premium \_\_\_\_\_ Premium to be sent to: \_\_\_\_\_

Location of policy \_\_\_\_\_  
Special instructions: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*Automobile Insurance*

Company \_\_\_\_\_ Policy number \_\_\_\_\_  
Issue date \_\_\_\_\_  
Premium amount \_\_\_\_\_  
Location of policy \_\_\_\_\_  
Special instructions \_\_\_\_\_

*Other Insurance Plans*

(List the following information for all fire, travel, and other policies, including "mortgage insurance" policies and those associated with memberships in fraternal or professional organizations, automobile clubs, mortgages, or other credit plans.)

Policy No. \_\_\_\_\_ Amount ? \_\_\_\_\_  
Issue date of policy \_\_\_\_\_ Insured's age at issue \_\_\_\_\_  
Annual premium ? \_\_\_\_\_ Paid up to \_\_\_\_\_  
Company and address of home office \_\_\_\_\_  
\_\_\_\_\_

Type of insurance \_\_\_\_\_  
Double indemnity \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_  
My broker or representative is \_\_\_\_\_  
\_\_\_\_\_

at \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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Policy loan \_\_\_\_\_ No \_\_\_\_\_ Yes Amount \$ \_\_\_\_\_

Policy owned by me \_\_\_\_\_ or by \_\_\_\_\_

Location of policy \_\_\_\_\_

Any special instructions \_\_\_\_\_

### G. PERSONAL PROPERTY

1. Location of inventory of household furnishings \_\_\_\_\_

Ownership Sole \_\_\_\_\_ Joint \_\_\_\_\_ With \_\_\_\_\_

Insurance policy numbers \_\_\_\_\_

Expiration dates \_\_\_\_\_

Location of insurance policies \_\_\_\_\_

Name of insurance company \_\_\_\_\_

Agent \_\_\_\_\_

Address \_\_\_\_\_

2. Jewelry \_\_\_\_\_

Ownership Sole \_\_\_\_\_ Joint \_\_\_\_\_ With \_\_\_\_\_

Location of Jewelry \_\_\_\_\_

Insurance policy numbers \_\_\_\_\_

Expiration dates \_\_\_\_\_

Location of insurance policies \_\_\_\_\_

Name of insurance company \_\_\_\_\_

Agent \_\_\_\_\_

Address \_\_\_\_\_

3. Automobile(s)

a. Kind, year \_\_\_\_\_

Ownership Sole \_\_\_\_\_ Joint \_\_\_\_\_ With \_\_\_\_\_

Title certificate No. and jurisdiction \_\_\_\_\_

Location of title \_\_\_\_\_

b. Kind, year \_\_\_\_\_

Ownership Sole \_\_\_\_\_ Joint \_\_\_\_\_ With \_\_\_\_\_

Title certificate No. and jurisdiction \_\_\_\_\_

Location of title \_\_\_\_\_

Insurance policy numbers \_\_\_\_\_

Expiration dates \_\_\_\_\_

Location of insurance policies \_\_\_\_\_

Name of insurance company \_\_\_\_\_

Agent \_\_\_\_\_

Address \_\_\_\_\_

4. Furs or other articles in storage \_\_\_\_\_  
\_\_\_\_\_  
Location of items \_\_\_\_\_  
Location of claim checks or papers \_\_\_\_\_  
Insurance policy numbers \_\_\_\_\_  
Expiration dates \_\_\_\_\_  
Location of insurance policies \_\_\_\_\_  
Name of insurance company \_\_\_\_\_  
Agent \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_
5. Collections (stamps, books, coins, paintings, etc.)  
Kind \_\_\_\_\_  
Location \_\_\_\_\_  
Kind \_\_\_\_\_  
Location \_\_\_\_\_  
Insurance policy numbers \_\_\_\_\_  
Expiration dates \_\_\_\_\_  
Location of insurance policies \_\_\_\_\_  
Name of insurance company \_\_\_\_\_  
Agent \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_
6. Silverware: \_\_\_\_\_  
Location: \_\_\_\_\_  
Value: \_\_\_\_\_  
Instructions \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. Any personal property on loan, pledged, or for some other reason  
not located in residence  
Kind \_\_\_\_\_  
Location \_\_\_\_\_  
Terms or reason for location \_\_\_\_\_  
\_\_\_\_\_  
Terms for return \_\_\_\_\_  
\_\_\_\_\_  
Location of claim checks or papers \_\_\_\_\_  
\_\_\_\_\_  
Instructions \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. Location of personal property tax receipts \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. I have in my use or possession the following personal property belonging to others, under these circumstances: \_\_\_\_\_

Kind or item \_\_\_\_\_

Location \_\_\_\_\_

Name and address of owner \_\_\_\_\_

Terms of loan or of my possession \_\_\_\_\_

Instructions \_\_\_\_\_

#### H. REAL ESTATE: RESIDENCE AND OTHER

Residence address \_\_\_\_\_

Rent or own \_\_\_\_\_

Name of landlord or agent \_\_\_\_\_

Address \_\_\_\_\_

Ownership title Sole \_\_\_\_\_ Joint \_\_\_\_\_ With \_\_\_\_\_

Mortgage held by \_\_\_\_\_

Address \_\_\_\_\_

Location of real estate documents:

Deed \_\_\_\_\_

Copy of mortgage \_\_\_\_\_

Tax receipts \_\_\_\_\_

Title insurance policy \_\_\_\_\_

Title abstract \_\_\_\_\_

Surveys \_\_\_\_\_

Other \_\_\_\_\_

#### *Insurance Policies*

No. \_\_\_\_\_ Amount \$ \_\_\_\_\_

Expiration date \_\_\_\_\_

Name of insurance company \_\_\_\_\_

Agent \_\_\_\_\_

Address \_\_\_\_\_

Location of policy \_\_\_\_\_

No. \_\_\_\_\_ Amount \$ \_\_\_\_\_

Expiration date \_\_\_\_\_

Name of insurance company \_\_\_\_\_

Agent \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
Location of policy \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Ownership title Sole \_\_\_\_\_ Joint \_\_\_\_\_ With \_\_\_\_\_  
Mortgage held by \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Location of real estate documents:  
Deed \_\_\_\_\_  
Copy of mortgage \_\_\_\_\_  
Tax receipts \_\_\_\_\_  
Title insurance policy \_\_\_\_\_  
Title abstract \_\_\_\_\_  
Surveys \_\_\_\_\_  
Other \_\_\_\_\_

*Insurance Policies*

No. \_\_\_\_\_ Amount \$ \_\_\_\_\_  
Expiration date \_\_\_\_\_  
Name of insurance company \_\_\_\_\_  
Agent \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Location of policy \_\_\_\_\_  
No. \_\_\_\_\_ Amount \$ \_\_\_\_\_  
Expiration date \_\_\_\_\_  
Name of insurance company \_\_\_\_\_  
Agent \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Ownership title Sole \_\_\_\_\_ Joint \_\_\_\_\_ With \_\_\_\_\_  
Mortgage held by \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Location of real estate documents:  
Deed \_\_\_\_\_  
Copy of mortgage \_\_\_\_\_  
Tax receipts \_\_\_\_\_  
Title insurance policy \_\_\_\_\_

(The same kind of information should be recorded for other real property—houses, apartments, stores, farms, land, etc.)

Title abstract \_\_\_\_\_  
Surveys \_\_\_\_\_  
Other \_\_\_\_\_

*Insurance Policies*

No. \_\_\_\_\_ Amount \$ \_\_\_\_\_  
Expiration date \_\_\_\_\_  
Name of insurance company \_\_\_\_\_  
Agent \_\_\_\_\_  
Address \_\_\_\_\_

Location of policy \_\_\_\_\_ Amount \$ \_\_\_\_\_  
No. \_\_\_\_\_  
Expiration date \_\_\_\_\_  
Name of insurance company \_\_\_\_\_  
Agent \_\_\_\_\_  
Address \_\_\_\_\_

Location of policy \_\_\_\_\_  
Address \_\_\_\_\_

Ownership title Sole \_\_\_\_\_ Joint \_\_\_\_\_ With \_\_\_\_\_  
Mortgage held by \_\_\_\_\_  
Address \_\_\_\_\_

Location of real estate documents:  
Deed \_\_\_\_\_  
Copy of mortgage \_\_\_\_\_  
Tax receipts \_\_\_\_\_  
Title insurance policy \_\_\_\_\_  
Title abstract \_\_\_\_\_  
Surveys \_\_\_\_\_  
Other \_\_\_\_\_

*Insurance Policies*

No. \_\_\_\_\_ Amount \$ \_\_\_\_\_  
Expiration date \_\_\_\_\_  
Name of insurance company \_\_\_\_\_  
Agent \_\_\_\_\_  
Address \_\_\_\_\_

Location of policy \_\_\_\_\_ Amount \$ \_\_\_\_\_  
No. \_\_\_\_\_  
Expiration date \_\_\_\_\_  
Name of insurance company \_\_\_\_\_



Agent \_\_\_\_\_

Address \_\_\_\_\_

Location of policy \_\_\_\_\_

### I. OTHER MISCELLANEOUS PROPERTY

(Business equipment, typewriters, adding machines, tractors, trucks, boats, airplanes, cameras, etc.)

1. Item \_\_\_\_\_ Model \_\_\_\_\_  
Make \_\_\_\_\_  
Location of item \_\_\_\_\_  
Ownership in whose name \_\_\_\_\_  
Location of papers \_\_\_\_\_  
Mortgage company \_\_\_\_\_  
Address \_\_\_\_\_

2. Item \_\_\_\_\_ Model \_\_\_\_\_  
Make \_\_\_\_\_  
Location of item \_\_\_\_\_  
Ownership in whose name \_\_\_\_\_  
Location of papers \_\_\_\_\_  
Mortgage company \_\_\_\_\_  
Address \_\_\_\_\_

### J. INTEREST IN BUSINESSES

Name of business \_\_\_\_\_  
Location \_\_\_\_\_  
Your position or interest \_\_\_\_\_  
Location of records of ownership \_\_\_\_\_  
Officials to be informed \_\_\_\_\_

(List same information for additional business interests)

### K. STOCKS AND BONDS

Valuable rights are often lost because the owners of stock certificates and bonds cannot be located. Records of purchase, sale, etc. are needed for tax purposes. List all stocks, bonds, mortgage notes and other investment securities, showing with respect to stocks, name of the company, kind of stock, certificate number and cost; with respect to bonds, obligor, amount, due date, interest rates and dates payable; description and similar information about notes and other securities, showing in every case the exact names under which owned.  
Location of list of holdings \_\_\_\_\_

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Location of certificates \_\_\_\_\_

Location of purchase and dividend records \_\_\_\_\_

Brokerage firm \_\_\_\_\_

Address \_\_\_\_\_

My representative or agent \_\_\_\_\_

*U.S. Savings Bonds*

Individual or co-ownership \_\_\_\_\_

Beneficiary \_\_\_\_\_

Location of the list of serial numbers \_\_\_\_\_

Location of bonds \_\_\_\_\_

**L. TRUST FUNDS**

Summary of trusts (designation of trusts, beneficiaries)

\_\_\_\_\_  
\_\_\_\_\_

Attorney who has details \_\_\_\_\_

Address \_\_\_\_\_

Location of basic trust documents \_\_\_\_\_

Location of trust records \_\_\_\_\_

Location of trust property, securities, etc. \_\_\_\_\_

**M. LOANS**

(In addition to those listed elsewhere)

*Payable*

Under these conditions \_\_\_\_\_

I owe money to \_\_\_\_\_

Address \_\_\_\_\_

Car \_\_\_\_\_

Furniture \_\_\_\_\_

Other \_\_\_\_\_

Name of loan company \_\_\_\_\_

Address \_\_\_\_\_

Payment due date \_\_\_\_\_

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*Receivable*

Notes \_\_\_\_\_

Trusts \_\_\_\_\_

Loans \_\_\_\_\_

The following persons owe me money in amounts indicated:

Name \_\_\_\_\_

Address \_\_\_\_\_ \$ \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_ \$ \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_ \$ \_\_\_\_\_

Location of records, notes, etc. \_\_\_\_\_

#### N. INCOME AND GIFT TAX RETURNS AND RECORDS

Copies of Federal and State (or D.C.) income tax returns, any gift tax returns, and similar records, are located: \_\_\_\_\_

Current year records to date are located \_\_\_\_\_

#### O. MEDICAL INFORMATION

(Indicate family doctor and any specialists and their specialties)

Name of doctor \_\_\_\_\_

Address and telephone number \_\_\_\_\_

Name of doctor \_\_\_\_\_

Address and telephone number \_\_\_\_\_

Name of dentist \_\_\_\_\_

Address and telephone number \_\_\_\_\_

Location of receipts for medical services, prescriptions, etc., to be submitted as claims under provisions of health insurance policies \_\_\_\_\_

Name \_\_\_\_\_  
Firm \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone number \_\_\_\_\_

Q. C.P.A. ACCOUNTANT

Name \_\_\_\_\_  
Firm \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone number \_\_\_\_\_

R. WILL

The law of the state is generally controlling with respect to a will, marriage, divorce and care and custody of children.

If you do not make a will your estate will be distributed among your heirs in accordance with the law. The court will appoint such administrators and guardians as may be necessary. This may cause your family trouble and expense that could be avoided by a properly drawn will. It is generally advisable to appoint a guardian (usually the wife or husband as the case may be) for your minor children in your will; otherwise the court will appoint one when necessary. It is most important to designate someone as guardian in the event of death of mother and father to eliminate family problems and to select the person(s) you desire to guide your children. \_\_\_\_\_

Have you made a will? Yes \_\_\_\_\_ No \_\_\_\_\_

Location \_\_\_\_\_

Date \_\_\_\_\_

Executor \_\_\_\_\_

Firm name (if any) \_\_\_\_\_

Address \_\_\_\_\_

Telephone number \_\_\_\_\_

Office \_\_\_\_\_ Home \_\_\_\_\_

(Executor should be promptly notified of the death of the employee)

Trustees (names and addresses) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Lawyer who drew my will \_\_\_\_\_

Address \_\_\_\_\_

### S. FUNERAL AND INTERMENT INSTRUCTIONS

Number of cemetery plot \_\_\_\_\_

Address \_\_\_\_\_

Deed \_\_\_\_\_

Location of deed \_\_\_\_\_

Perpetual care \_\_\_\_\_ Yes \_\_\_\_\_ No

Location of instructions regarding funeral \_\_\_\_\_

Who should be contacted about arrangements? \_\_\_\_\_

Wishes with regard to funeral, funeral director, disposition of remains,  
choice of minister, interment, remembrances in lieu of flowers, etc.

Veteran's eligibility for burial of self, wife, and minor children in a  
National Cemetery \_\_\_\_\_

Disposition of personal clothing and minor household items (this will  
not take the place of a will).

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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W. CALCULATION OF BENEFITS

The focal point of all your arrangements, of course, is, "What security will my immediate family, other dependents, or other heirs have, if I should drop out of the picture?" In order to put your arrangements in that perspective, it will be useful to summarize the data in the following way:

Calculation of benefits and income to my survivors:

If I died today,

1. My widow(er) would receive:

a. Lump sum payments of:

	<i>Non-accidental</i>	<i>Accidental</i>
(1) Unpaid compensation and accumulated annual leave ...	\$ _____	\$ _____
(2) FEGLI.....	\$ _____	\$ _____
(3) USGLI, NSLI or SGLI.....	\$ _____	\$ _____
(4) Other insurance:		
(a).....	\$ _____	\$ _____
(b).....	\$ _____	\$ _____
(c).....	\$ _____	\$ _____
(5) Federal Employees' Compensation (or Bureau) payment for burial, etc.....		\$ _____

TOTAL..... \$ \_\_\_\_\_ \$ \_\_\_\_\_

b. Monthly income of:

(1) Federal Civilian Retirement Survivor annuity.....	\$ _____	\$ _____
(2) Social Security Survivor's Annuity (if eligible).....	\$ _____	\$ _____
(3) Federal Employees' Compensation Annuity (if eligible and if elected in lieu of Retirement Annuity)....	\$ _____	\$ _____
(4) Veterans benefits.....	\$ _____	\$ _____
(5) Military Retirement Annuity	\$ _____	\$ _____
(6) Private insurance annuity plans:		
(a).....	\$ _____	\$ _____
(b).....	\$ _____	\$ _____
(c).....	\$ _____	\$ _____
(7) Dividends.....	\$ _____	\$ _____
(8) Interest.....	\$ _____	\$ _____
(9) Rentals.....	\$ _____	\$ _____
(10) Trust payments.....	\$ _____	\$ _____
(11) Business income.....	\$ _____	\$ _____



	<i>Non-accidental</i>	<i>Accidental</i>
(12) Other income:		
(a).....	\$ _____	\$ _____
(b).....	\$ _____	\$ _____
(c).....	\$ _____	\$ _____
TOTAL.....	\$ _____	\$ _____

2. *EACH* of my children would receive:

Oldest child (born \_\_\_\_\_)  
 Second child (born \_\_\_\_\_)  
 Third child (born \_\_\_\_\_)

a. Lump sum payments of:

(1) Unpaid compensation and accumulated annual leave ...	\$ _____	\$ _____
(2) FEGLI.....	\$ _____	\$ _____
(3) USGLI, NSLI or SGLI.....	\$ _____	\$ _____
(4) Other insurance:		
(a).....	\$ _____	\$ _____
(b).....	\$ _____	\$ _____
(c).....	\$ _____	\$ _____
TOTAL.....	\$ _____	\$ _____

b. Monthly income of:

(1) Civil Service Retirement Survivor Annuity.....	\$ _____	\$ _____
(2) Social Security Survivor's Annuity (if eligible).....	\$ _____	\$ _____
(3) Federal Employees' Compensation Annuity (if eligible and if elected in lieu of Retirement Annuity).....	\$ _____	\$ _____
(4) Veterans benefits.....	\$ _____	\$ _____
(5) Private insurance annuity plans:		
(a).....	\$ _____	\$ _____
(b).....	\$ _____	\$ _____
(c).....	\$ _____	\$ _____
(6) Dividends.....	\$ _____	\$ _____
(7) Interest.....	\$ _____	\$ _____
(8) Rentals.....	\$ _____	\$ _____
(9) Trust payments.....	\$ _____	\$ _____
(10) Business income.....	\$ _____	\$ _____

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(11) Other income:	<i>Non-accidental</i>	<i>Accidental</i>
(a).....	\$ _____	\$ _____
(b).....	\$ _____	\$ _____
(c).....	\$ _____	\$ _____
<hr/>		
TOTAL .....	\$ _____	\$ _____

Note: If you have other relatives who are dependent upon you in whole or in part, you will undoubtedly want to use a similar format and calculate the survivors' benefits and other income which each one will have under varying circumstances.

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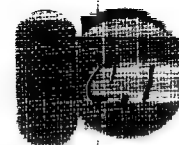


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ITAB  
C

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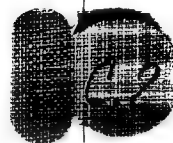
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Approved For						
NAME	YEAR	LOCATION	PROFESSIONAL	CREATIVE AND TECHNICAL	TRADE/CLERICAL AND SALES	MANAGEMENT AND ADMIN
			<u>TEACHING</u>	<u>COMMO</u>	<u>SECRETARIAL</u>	<u>EXECUTIVE</u>
			Elementary	<u>PHOTOGRAPHY</u>	<u>CLERICAL</u>	<u>FINANCIAL</u>
REMAIN IN D. C. AREA			Secondary	<u>NEWS MEDIA</u>	<u>TRADE</u>	<u>LOGISTICS</u>
RELOCATE - NEW ENGLAND AREA			Public	<u>CREATIVE WRITING</u>	<u>SALES</u>	<u>PERSONNEL</u>
RELOCATE - SOUTHERN U.S. AREA			Private	<u>EDITING</u>		<u>SECURITY</u>
RELOCATE - CENTRAL U.S. AREA			College/ University	<u>ART/MUSIC</u>		
RELOCATE - WESTERN U.S. AREA			<u>LAW</u>	<u>ELECTRONICS</u>		
RELOCATE - MIDDLE ATLANTIC AREA			<u>LINGUISTICS</u>			
RELOCATE - OVERSEAS			<u>SCIENTIFIC</u>			
			<u>RESEARCH</u>			
TO RETIRE WHEN SCHEDULED			<u>LIBRARIAN</u>			
ELIGIBLE TO RETIRE EARLIER THAN SCHEDULED						

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SECRET  
(When Filled In)

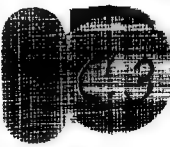
NAME		Approved For Release 2001/09/04 : CIA-RDP90-00708R000300010001-5	
INTERVIEW DATE	DETAILS OF SITUATION AND ACTION TAKEN (Cont'd)		

SECRET

NAME (Last, first, middle)		TITLE		GRADE	SALARY	OFFICE DATA	TYPE REFERRAL
Approved		For Release 2001/09/04		CIA-RDP90-00708R000300010001-5			
DOB	EOD	LWD (If applicable)	OTHER DATA				OP INTERVIEWER
INTERVIEW DATE	DETAILS OF SITUATION AND ACTION TAKEN						

PERSONNEL INTERVIEW RECORD

☐ CONTINUE ON REVERSE SIDE



EXTERNAL EMPLOYMENT ASSISTANCE INFORMATION

NAME \_\_\_\_\_ DATE \_\_\_\_\_

ANTICIPATED DEPARTURE: \_\_\_\_\_ (month) \_\_\_\_\_ (year)

LOCATION INTEREST:

(In order of priority  
identify three if  
possible)

(1)	_____ (area)	_____ (state)	_____ (city)
(2)	_____ (area)	_____ (state)	_____ (city)
(3)	_____ (area)	_____ (state)	_____ (city)

EMPLOYMENT INTEREST:

Professional	_____ (field)	_____ (specific)
Business	_____ (field)	_____ (specific)
Commercial	_____ (field)	_____ (specific)
Technical	_____ (field)	_____ (specific)
Research	_____ (field)	_____ (specific)
Creative	_____ (field)	_____ (specific)

SALARY INTEREST:

(In addition to annuity  
and other income)

check:

amount:

Required  
(lowest acceptable  
salary)

( ) Full-time  
( ) Part-time

Desired  
(reasonable high  
salary)

( ) Full-time  
( ) Part-time

FURTHER DETAILS AND EMPLOYEE SPECIALTIES TO ASSIST IN JOB SEARCH:

(NOTE: This form is to be filled out by any employee requesting external employment assistance. All employees reaching the five year zone of retirement consideration will be questioned concerning employment interest after retirement. An employee may on his own initiative at any time or at time of annual approach by his Retirement Counselor, initiate action or change information or intent carried on an earlier prepared form.)



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GUIDANCE FOR COMPONENT PERSONNEL OFFICERS  
RELATIVE TO THE PREPARATION OF THE SUMMARY OF AGENCY EMPLOYMENT (SAE)

GENERAL INFORMATION

This folder contains, on the opposite side, samples of the various items of documentation that might be utilized by employees upon separation from the Agency. The Summary of Agency Employment should be in the possession of each departing employee. Samples are being furnished of various types of documentation so that you might be better prepared to respond to related queries from employees preparing to separate from the Agency. Component and career service personnel officers will have responsibility for assisting in the preparation of SAEs only. Employees desiring assistance with retirement documentation other than SAEs should be referred to EEAB, [REDACTED] Room 202, Magazine Building.

Each of the Tabs carries a brief description of the purpose of that type of document, as portrayed by the following samples. One feature in the preparation of the Standard Form 171 (see Tab 3) needs specific mention. Each numbered block in Section 18 of the Form (Experience) requests the applicant to furnish the name and title of his immediate supervisor. If a question relative to listing a supervisor(s) is brought to your attention, it is Agency policy to cite only the Director of Personnel (by title, not by name) in this block. The proper information to be inserted is: Director of Personnel, Phone [REDACTED]

Beneath this guidance sheet is a copy of the instruction to individuals concerning preparation of the Summary of Agency Employment by the employee and the form to be used. You will be furnished a supply of these instructions with forms attached so that you may give one to each person about to prepare his Summary.

ASSISTANCE TO BE GIVEN BY COMPONENT PERSONNEL OFFICER

1. When an employee has begun his final assignment, is on the verge of optional early retirement or has stated his intention to resign, give him a copy of the Instruction sheet with the attached SAE form.
2. Determine whether or not he has ever been under cover. If so, he should go first to the Central Cover Staff where the cover plan to be followed in his SAE, will be agreed upon.
3. After receiving the employee's proposed SAE, route it to the appropriate offices for review, comment and approval. It must always be examined by the career service and the Office of Security; if he has ever been under cover or served in the Clandestine Services it must also be routed to Central Cover Staff and CI Staff.
4. After approval by all responsible offices, you should reproduce a copy of the summary statement only, reflecting all corrections and changes, and give it to the employee.
5. The original SAE with the initials of the approving officers and their recommended changes, if any, will be forwarded for inclusion in the employee's Official Personnel File.

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S-E-C-R-E-T

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## INSTRUCTIONS FOR PREPARATION OF SUMMARY OF AGENCY EMPLOYMENT (SAE)

(Blank for submitting your SAE is attached)

The purpose of this instruction is to provide you with guidance for preparing your Summary in a manner that does justice to your record of employment with the Agency.

Each person who leaves the Agency will find it useful to have, for his permanent retention and use, a statement covering his employment by the Agency. This Summary will be useful in applying for other employment or when responding to requests for information concerning his background. In order to satisfy the continuing obligation to protect Agency security interests, such a Summary must be reviewed and approved by the Office of Security and the Central Cover Staff, and CI Staff.

The person best qualified to prepare your Summary is yourself. You have a better grasp of and appreciation for what you did in the Agency than has anybody else, and your Summary will present this information in your own unique style. The personnel officer of your component will gladly show you several samples of Summaries.

The Summary should be a narrative of your most significant attributes and fundamental knowledge acquired and applied during your employment with the Agency. Briefly, it should portray your highest levels of skill and responsibility. This will undoubtedly mean concentration on what you did in your later years in the Agency as opposed to what you did in your initial years. You should not go into such details as to cover everything you did, nor should you be so general as to blur important and significant services rendered. You should concentrate on giving a clear and concise description of those aspects of your employment which will establish your professional stature, portray the level of your supervisory and functional responsibilities, and describe the level and types of your coordination. Do not "blow yourself up"; on the other hand, do not let too much modesty eclipse a clear picture of your qualifications. Spend some time at organizing your narrative, and rewrite it until you have a clear and sufficient description of your skills, techniques, abilities and levels of supervisory responsibilities.

After you have drafted your Summary, give it to your personnel officer for his transmittal to your career service, Security and if appropriate, to Cover, CI Staff and any other concerned component. You might be asked to visit one of these offices if there are questions on what you wrote or if some revision might be necessary. When your career service, Security, and if appropriate, Cover and CI Staff approve your Summary, they will record their approvals on the Summary Form and return it to your personnel officer. He will have this processed draft placed in your Official Personnel File, after making a clean corrected copy for your permanent retention and use.

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S-E-C-R-E-T



SECRET

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SUMMARY OF AGENCY EMPLOYMENT

NAME OF EMPLOYEE	GRADE	CAREER SERVICE	DATE SUBMITTED
------------------	-------	----------------	----------------

All information in the body of this Summary will be considered as UNCLASSIFIED after full review and approvals by appropriate offices. If additional space is required, use same size sheet as this page and attach hereto.

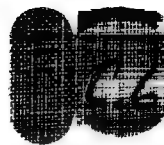
COORDINATION REVIEWS AND APPROVALS  
(Cross out all non-applicable offices)

COMPONENT SUPPORT OFFICER	DATE	SPECIAL STAFFS OR COMPONENTS		OFFICE OF SECURITY/EAB	DATE
		CCS	DATE	COMPONENT SUPPORT OFFICER (Pers.)	
		CI	DATE		
CAREER SERVICE	DATE	OTHER	DATE	DATE FORWARDED TO OFFICIAL PERSONNEL FOLDER	

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SECRET

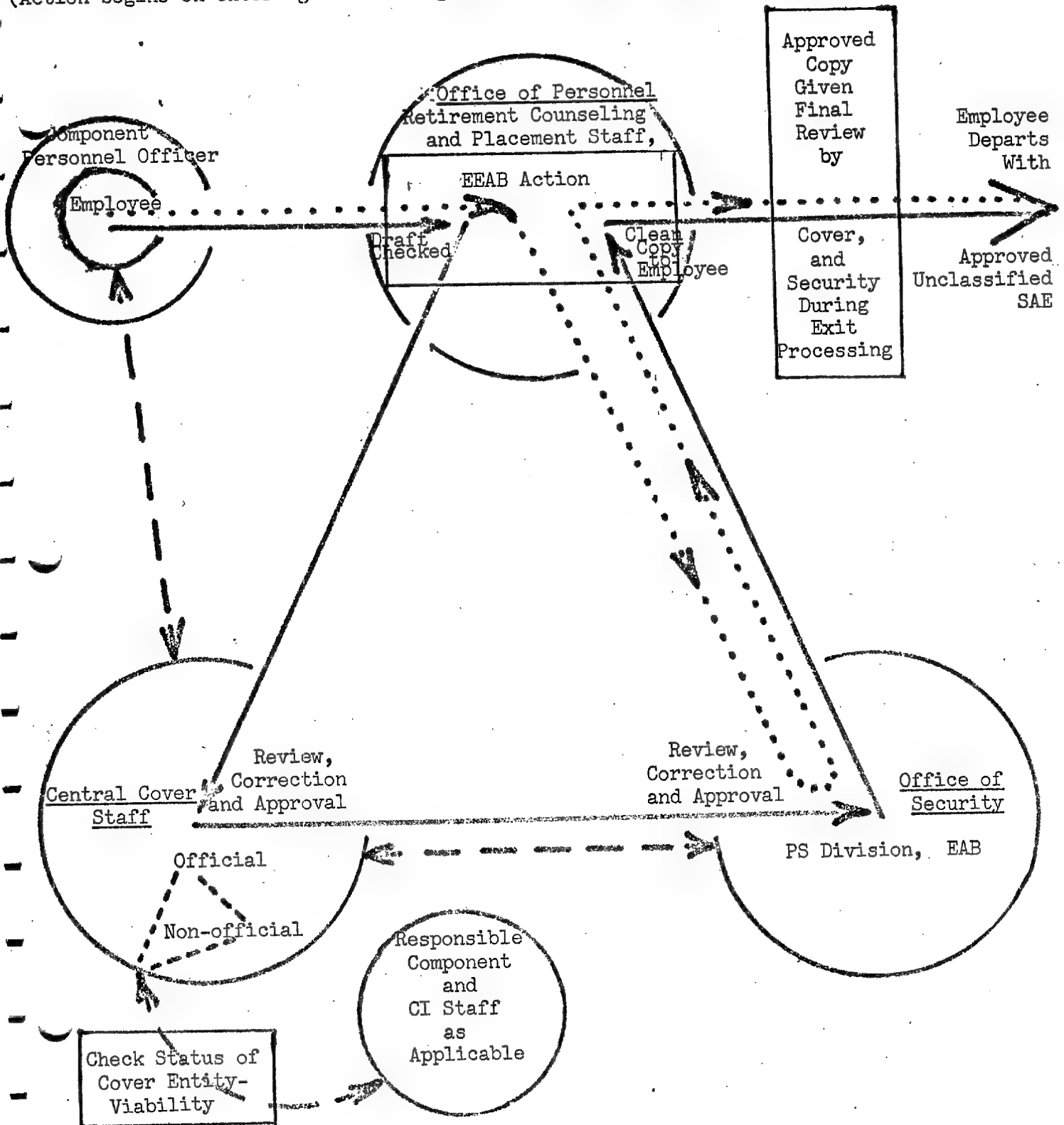
Group 1 stamp



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SUMMARY OF AGENCY EMPLOYMENT (SAE)

Chart of Interim Procedure For ALL Retirees And Resignees, Pending Regulatory Issuances.  
(Action begins on entering final assignment or on announcement of imminent separation)

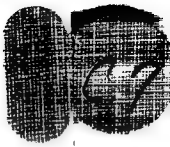


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Coordination during SAE processing; where cover is involved employee checks story with CCS before commencing to draft his SAE

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ORGANIZATIONS COOPERATING WITH RCPS IN THE  
EXTERNAL EMPLOYMENT ASSISTANCE PROGRAM  
SINCE 1 June 1968

Alexandria Public School System  
American Institute of Foreign Trade  
American Technical Assistance Company  
Arizona State University  
Association of American Geographers

Bank of America  
Bishop's Service, Inc.

Catholic University  
Center for Research in Social Systems  
City of Milwaukee  
Coordinating Council for Higher Education, State of California

Disney Productions

E. J. Charters Associates Inc.  
Equitable Life Assurance Society

Florida Investigator Agency  
Foreign Area Studies

General Electric (Philadelphia)  
General Public Utilities Corp.  
George F. Cake and Company

Hughes Arizona Operations  
Hughes Tool Co.

International Association of Chiefs of Police

John Carroll University  
John Powell Associates

Lingenfelter  
Lockheed Aircraft (California)  
Lockheed - Georgia Co.

Madison High School  
Massachusetts Mutual Life Insurance Company  
McDonald Douglas Corp  
Metropolitan Life  
Mil Pac Inc.  
Monsanto Chemical Co.  
Mormon Church

ILLEGIB

National Association of Independent Schools  
National Education Association  
Northeastern University  
Northern Systems Company  
Northern Virginia Community College

Operations Research Inc.

Pacific Gas and Electric Co.  
Peoples Drug

Radiation Incorporated  
Radio Science Company  
Rio Grande College

Sagner Corp.  
Security Pacific National Bank  
Sjostrom Automatics  
Stanford Research Institute  
State of Arizona  
State of Pennsylvania  
State University of New York  
Systems Research in Social Systems

T. C. Williams High School  
Telephone Equipment Design Engineering

University of Arizona  
University of Maryland

Valley National Bank

WAEPA  
Worldwide Assurance for Employees of Public Agencies

EXTERNAL POSITIONS THAT HAVE COME TO THE  
ATTENTION OF RCPS SINCE 1 June 1968

Accountant  
Administrative Assistant  
Administrative Officer (Colleges)  
Area Specialist  
Auditor  
Bank Officer  
Blue Collar Workers  
Computer Programmer  
Conservationist  
Economist  
Electrical Engineer  
Electronic (Antenna) Engineer  
Electronic Engineer  
Electronic Specialists  
Estate Manager  
Executive Secretary  
Finance Officer  
Firearms Salesman  
Foreign Trade Specialists  
Grocery Store Operator  
Housekeeper  
Instructor  
Insurance Salesman  
Office Manager  
Operations Research Specialists  
Personnel Analyst  
Personnel Assistant  
Personnel Director  
Photographer  
Professors  
Research Specialist  
Resident Manager (Apartment)  
Sales people (retail)  
School Department Head  
School Director  
Secretary  
Security Officer  
Service Station Operator  
Show room Manager (Wearing apparel)  
Student Affairs Officer  
Systems Analyst  
Writer-researcher

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COMPANY NAME

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ADDRESS		OFFICER	OFFICE	AGENCY OFFICER	HOLD INFORMATION	
CITY	STATE ZIP				OFFICE	PHONE
TELEPHONE NO.	DATE OF INITIAL CONTACT				OFFICE	PHONE
COMPANY SPECIALITY					OFFICE	PHONE

CANDIDATE		DATE OF VACANCY	APPLICATION								JOB TITLE OF OFFER	SALARY	DATE OF HIRE	REMARKS
NAME	QUALIFICATIONS		DATE CANDI- DATE ADVISED	WRITTEN APPLI- CATION		PERSONAL INTER- VIEW		JOB OFFER						
				YES	NO	YES	NO	YES	NO					

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FORM 2882  
5-68

COMPANY RESPONSE

(4-11-13)

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INTEREST (*List fields of employment*)

NO INTEREST

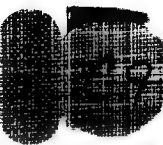
(*List fields of employment*)

OTHER INFORMATION RE COMPANY

RCPS EVALUATION OF COMPANY

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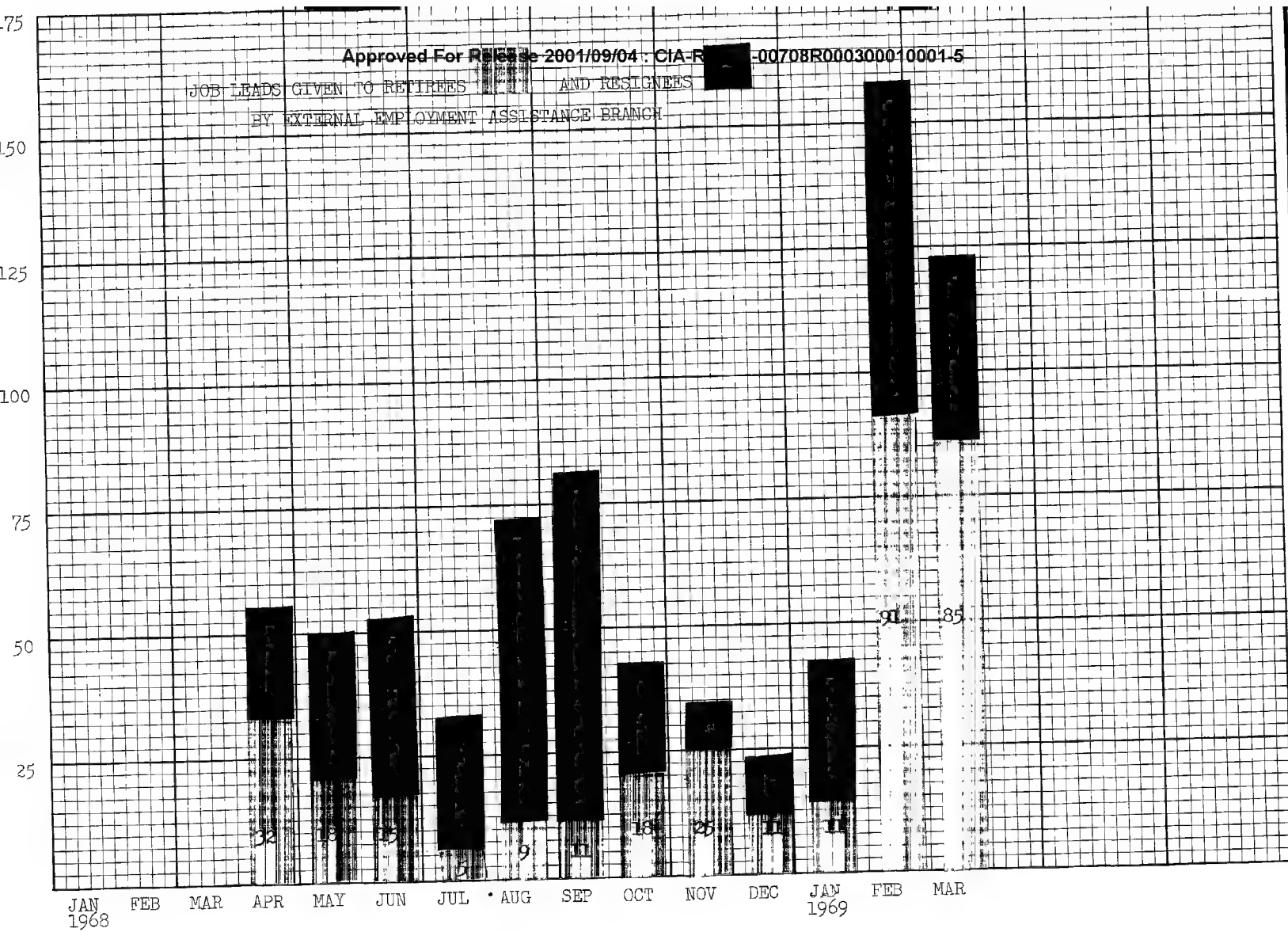
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JOB LEADS GIVEN TO RETIREES AND RESIGNEES  
BY EXTERNAL EMPLOYMENT ASSISTANCE BRANCH



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IF YOU PLAN TO TEACH IN THE FALL OF 1969 YOU SHOULD HAVE YOUR APPLICATION FILED BY MID-MARCH. IF YOU PLAN TO TEACH IN FEBRUARY OR SEPTEMBER OF 1970 IT IS NOT TOO SOON TO APPLY NOW.

ANYONE WHO CONTEMPLATES A SECOND CAREER IN THE ACADEMIC WORLD ANYTIME IN THE NEXT FIVE YEARS SHOULD SEE HIS RETIREMENT COUNSELOR AS SOON AS POSSIBLE. CALL [REDACTED] FOR AN APPOINTMENT. STATINTL

POSITION

		<u>SALARY</u>	<u>LOCATION</u>	<u>DATE TO BE FILLED</u>
1039A	<u>DIRECTOR OF PHYSICAL PLANT</u>  RESPONSIBLE FOR MAINTENANCE OF BUILDINGS & GROUNDS ON UNIVERSITY CAMPUS ENGINEERING DEGREE	OPEN	IOWA	IMMEDIATELY
1039B	<u>BUSINESS MANAGER</u>  V.P. FOR BUSINESS AND FINANCE	LOW 20'S	WASHINGTON STATE	IMMEDIATELY
1040A	<u>GEOGRAPHER</u>  ASSISTANT PROFESSOR	\$10-12,000	CALIFORNIA	IMMEDIATELY
1040B	<u>GEOGRAPHY EDITOR</u>  PLANNING, EDITING, MAINTENANCE & REVISION OF MAPS	OPEN	ILLINOIS	IMMEDIATELY
1041A	<u>SECURITY OFFICER</u>  INDUSTRIAL & PERSON- NEL WITH A MAJOR AIRCRAFT SERVICE CO.	\$12-15,000	JFK INTER- NATIONAL-- NYC	IMMEDIATELY

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JOB LEADS FOR RETIREE ELIGIBLES

ADDITIONAL LEADS AVAILABLE

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DATE POSTED: 15 NOVEMBER 1968

<u>POSITION</u>	<u>SALARY</u>	<u>LOCATION</u>	<u>DATE TO BE FILLED</u>
109 OPERATIONS RESEARCH SPEC BA Business Admin plus appropriate management experience.	\$15,000	California	Immediately
1012 COUNTRY CLUB MANAGER Experienced in the man- agement of dining room, kitchen, lounge etc. Will be responsible for purchase of food and food stuffs - Supervise help - Arrange parties. Not responsible for golf course.	Up to \$15,000	Local	On or before 3/69
1014 A DIR PLANTS & FACILITIES Oversee plant maintenance and construction at a college.	\$16,000	NY State	Immediately
1014 B COLLEGE INSTRUCTOR College Instructors thru professors to teach in all disciplines MA required PhD preferred.	Open	NY State	9/69
1018 SECURITY OFFICER Patrolman at local college. Shift work	\$4896 Plus one free college course per semester	Local	Immediately
1019 ESTATE MANAGER Live on estate while owners are on 2 year world tour	\$175 per month plus use of estate	Local	Immediately
1020 COMMUNICATIONS ENGR Design & Development of high frequency receivers & amplifiers	Up to \$20,000	Local	Immediately
1020 A COMMUNICATIONS TECH Asst to 1020 trouble- shooting testing HF receivers & amplifiers	\$10-12,000	Local	Immediately
1021 SECURITY OFFICER Investigation, Interviewing, Physical and Personnel Security	\$13-16,000	Phila	Immediately

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JOB LEADS FOR RETIREE ELIGIBLES

ADDITIONAL LEADS AVAILABLE - x3295

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EXTERNAL EMPLOYMENT ASSISTANCE BRANCH  
211 MAGAZINE BLDG.

NAME OF ORGANIZATION		TITLE/KIND OF POSITION	
<input type="checkbox"/> APPLIED IN PERSON <input type="checkbox"/> BY MAIL <input type="checkbox"/> FOLLOW-UP <input type="checkbox"/> NO FURTHER CONTACT			
<input type="checkbox"/> ACCEPTED FOR POSITION  <input type="checkbox"/> REJECTED FOR POSITION	REASON DECLINED POSITION <input type="checkbox"/> SALARY <input type="checkbox"/> LOCATION <input type="checkbox"/> DUTIES <input type="checkbox"/> OTHER (specify):		
	GIVE REASON, IF KNOWN		
DATE	SIGNATURE		
FORM 2917 8-68		JOB LEAD RECORD (4-13)	

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seeking a **job**

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# *Getting Job Leads*



*You* have written your resume,  
now put it to work.

## **Make A Brief**

Before applying for a position hand tailor a Brief composed of extracts from your Resume. The Brief should include only that part of your Resume information which is pointed at the specific type of position for which you are applying; i.e. teaching, research or writing.

## **There is no single approach**

You must follow every lead you can discover. Personal contact is very important in providing leads to worthwhile jobs. You would be ill-advised not to give your friends and associates the chance to help you find the position you want. Consider all the people you know who might be able to provide you with valuable contacts.



TAKE STOCK OF YOURSELF. WHAT CAN YOU DO? AFTER YOU HAVE LISTED YOUR SKILLS, RELATE THEM TO JOBS.



Canvass  
the newspaper  
ads daily.

You would be unwise not to recognize the problems with which you will be faced in seeking employment. You will be entering a new competitive area in which your success will be determined by your own initiative and resourcefulness. It will be up to you to decide on the job or the type of occupation in which you are interested and for which you are qualified, and then go out and find it. It is not likely that the job will find you. And you should not expect, as a matter of course, to start at the top of your occupational field.

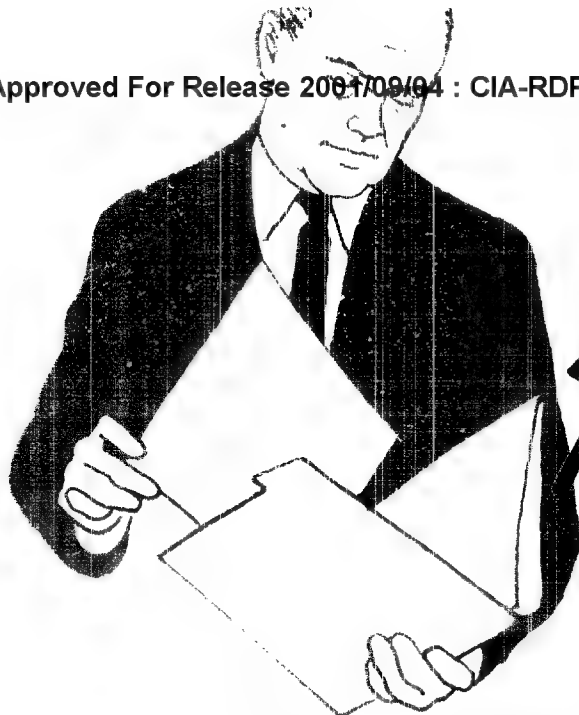
# *Your Application Letters*

Authorities disagree on the effectiveness of mailing a brief to an organization, but in some cases this may be your only avenue of approach. Never send a brief without a cover letter.

1. The application letter should be addressed to an official of the organization, by name if possible, or by title if the name is unknown.
2. A good application letter is short, concise, grammatically accurate and sincere. Indicate why you are interested in the organization and try to apply your qualifications, expressing what contributions you believe you might make. Gear your letter to the organization, its products or services, creating the impression that you have singled out that particular organization.
3. Use of the pronoun "I" is not objectionable, but avoid creating an egotistical tone.
4. The letter should refer to the brief enclosed and express a desire for an interview.
5. Allow one or more weeks for an acknowledgment of your communication.



It is most preferable to apply for a position in person, carrying your Brief with you.



## *Your Job Interview*

You may be completely capable of filling the job you are seeking, but the half hour or so you are given with the interviewer is when you have to sell yourself. Here are some of the things you can keep in mind:

1. Get the name of the company straight, along with its address. Know what its products or services are. Plan to arrive for the interview at least 15 minutes early.

2. Have copies of your resume with you, whether or not you have previously mailed it to the organization. You may need it for reference; or the interviewer may request additional copies.

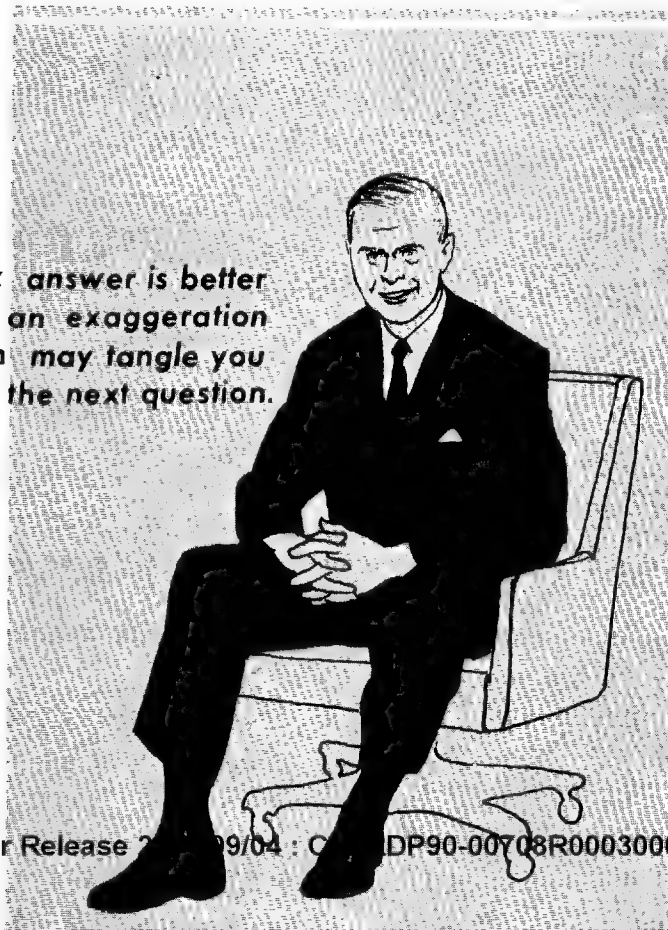
3. It goes without saying that your personal appearance at an interview must pass inspection. Dress conservatively and neatly.

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You cannot rehearse your role in an upcoming interview. You must rely on your own native courtesy and good sense. Remember, the interviewer wants to hire you if you have something to offer his organization.

In most cases, an interview will start with "tell me about yourself," so be prepared. Be as specific as you can, informative without boasting or telling your troubles. Keep following the interviewer's lead, don't answer yes or no, on the other hand don't talk too much. Some interviewers like to do most of the talking and judge you by your reactions, others speak hardly at all, their attitude is that it is your job to sell yourself. Most interviews follow a question and answer formula, in this case your ability to answer quickly and intelligently is of great importance. If your answers are confused, your case is lost.

*A* frank answer is better than an exaggeration which may tangle you up in the next question.



4. When possible, apply for a specific job or line of work. Try to avoid giving the impression that you have come in to look over the possibilities and that you are not sure of what you want.

5. Raise questions about the company, but remember you may be asked the reasons for your inquiry.

6. If you are offered a job on the spot and you are sure it is what you want accept with a definite yes. If you have any doubts, ask for time to think it over. Set a definite date when you can provide an answer. Above all, don't create the impression that you are playing one company against another. Very few job offers are made during the interview, other candidates likely will be seen and higher officials may have to review your qualifications.

7. Salary discussions are an inevitable part of an interview. Be realistic in your salary requirements. Most companies promote from within, they can't bring in someone from the outside when they have a man who not only has the education, training and know-how that the job requires, but also has been with them for 15 years.

8. Be alert to signs from the interviewer that the session is almost at an end. If you want the job, sum up your interest briefly, say that you are interested, then stop. Be certain to thank the interviewer for his time and consideration of you. Show as much confidence in leaving as you did on arriving.

# Post Interview "Itch"

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If the interviewer seemed really interested in you, or perhaps indicated that you would hear from him—and you don't hear from him—wait about a week after the date of contact indicated, then make a phone call or write a brief note to remind him of your talk. You have little to lose at this point by refreshing his memory, and you might get a favorable response. If you do not get a flat rejection—if there is still some suggestion that you should keep in touch, by all means keep in touch.

If you don't connect immediately, you at least will learn much from your first interview, the important thing is to keep trying.

A number of organizations may be considering your application. It is only fair to inform all persons concerned if you accept employment. It will save a good deal of unnecessary effort and avoid embarrassment to those who may still be trying to find you a job.

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**T**HE JOB YOU WANT IS WAITING SOMEWHERE. IT IS HOPED THAT THE MATERIAL HEREIN WILL PROVIDE THE NECESSARY DIRECTION TO ENABLE YOU TO LAUNCH YOUR OWN JOB PROCUREMENT PROGRAM—ESSENTIALLY A DO-IT-YOURSELF TASK.

AGGRESSIVENESS, PERSISTENCE, AS WELL AS PATIENCE, WE HOPE WILL REWARD YOU WITH THE POSITION YOU DESIRE. REMEMBER.

OFFICE OF PERSONNEL  
RETIREMENT COUNSELING AND PLACEMENT STAFF  
EXTERNAL EMPLOYMENT ASSISTANCE BRANCH

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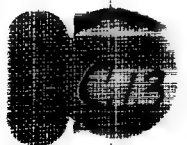
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Additional information is available through the Retirement Counselors  
and in the Retirement Reading Room.

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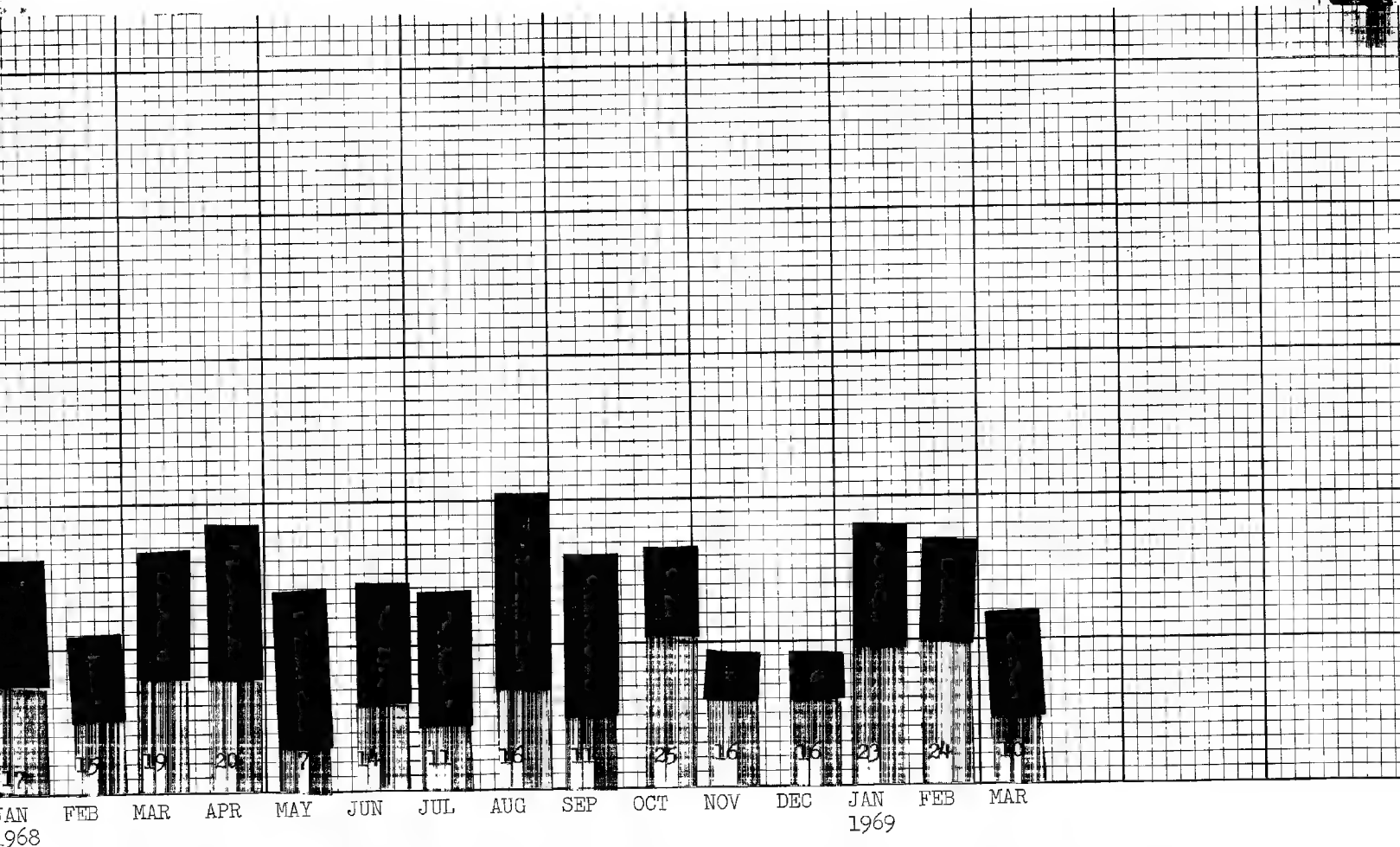


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EMPLOYMENT ASSISTANCE GIVEN TO RETIREES AND RESIGNEES

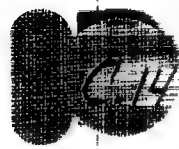
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31 December 1968

Mr. John Q. Jones  
9033 Johnson Street  
Alexandria, Virginia 22308

Dear Mr. Jones:

As your former employer, the organization is sincerely interested in you and trusts you find the transition period a pleasant experience. I am sure you know the whole retirement program is receiving much emphasis by senior officials here.

In order to maintain contact with you, and to provide guidance and statistical background for aiding future retirees, we would like for you to complete the attached form. Any questions on the form that you feel you should not answer, please leave blank and complete the remainder and return it as soon as possible.

Thank you very much for your consideration.

Sincerely,

  
Personnel Officer

STATINTL

Enclosures:  
Questionnaire  
Envelope

NAME \_\_\_\_\_

CURRENT ADDRESS \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PHONE \_\_\_\_\_

EMPLOYED

YES \_\_\_\_\_

NO \_\_\_\_\_

(If yes)

Employer \_\_\_\_\_

Job Title \_\_\_\_\_

Salary \_\_\_\_\_

Full Time \_\_\_\_\_

Part Time \_\_\_\_\_

INFORMATION DESIRED

SUGGESTIONS

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**S E C R E T**

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